

UGMA / UTMA Successor Custodian Designation Form

You may use this form to designate a Successor Custodian to an UGMA / UTMA Account. Please complete this form and return it to PSS using the delivery instructions below.

INFORMATION ABOUT THE CURRENT CUSTODIAN

Full Name: _____ Account Number: _____
(Include Middle Initial)

Mailing Street Address 1: _____ Mailing Street Address 2: _____

City: _____ State: _____ Zip Code: _____

Home Phone Number: _____ Work Phone Number: _____

SUCCESSOR CUSTODIAN NAME

Full Name: _____ Date of Birth: _____ Relationship to Minor: _____
(Include Middle Initial)

SIGNATURES

As current custodian for the above-referenced account, I hereby designate the individual named in Section 2 as Successor Custodian to

NOTARY

Name of Notary: (print name) _____

Notary Address: _____

Notary Stamp

Once completed, mail the form to the appropriate address listed for processing.

Please send to:

Regular Mail

Overnight Mail

Primerica Shareholder Services
P.O. Box 534485
Pittsburgh, PA 15253 – 4485

Primerica Shareholder Services
Attention: 534485
500 Ross Street, 154-0520
Pittsburgh, PA 15262