

Coverdell ESA Successor Responsible Party Designation Form

You may use this form to designate a Successor Responsible Party to an Coverdell ESA Account. Please complete this form and return it to PSS using the delivery instructions below.

1 | INFORMATION ABOUT THE RESPONSIBLE PARTY

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: _____

2 | SUCCESSOR RESPONSIBLE PARTY NAME

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

3 | SIGNATURES

As current responsible party for the above-referenced account, I hereby designate the individual named in Section 2 as Successor Responsible Party to succeed my duties as responsible party, to be effective upon my resignation, death, incapacity or removal as responsible party.

Signature of Current responsible party: _____

4 | NOTARY

NOTE: The notary may not be the person named as Successor Responsible Party in Section 2 above.

Name of Notary: (print name) _____

Notary Address: _____

Notary Phone number: _____

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
	Client Services: (800) 544-5445	