

BlackRock 529 CollegeAdvantage

Change of Name Form

You can use this form to update your name (i.e. if changed due to marriage, divorce, etc.) on your existing BlackRock CollegeAdvantage® 529 Plan accounts.

- ▶ All information provided on each person listed on the account will be verified as required by the USA PATRIOT Act.
- ▶ If your request requires a Medallion Signature Guarantee or notary, we may not be able to accept a fax copy.

Send this form, along with any other required documents, to:

▶ **Regular mail:**

BlackRock 529
P.O. Box 9783
Providence, RI 02940

▶ **Overnight mail:**

BlackRock 529
4400 Computer Dr
Westborough, MA 01581

Fax: 508-599-6054



Questions? Call us at **866-529-8582**, Monday through Friday between 8:00AM and 6:00PM ET or visit us online at blackrock.com/collegeadvantage.

If you are changing your name due to marriage, divorce, legal change, etc., please complete this form to update your account(s) under your Social Security number. **NOTE:** You will need to sign with both your old and new name in the **"Signatures"** section of this form. The signature of your old name (as it currently appears on your account) will require a notary seal. A copy of any marriage certificate or court order documenting the legal name change may be requested.

To make any other changes to your account registration (i.e. changing the Account Owner, Successor Owner, Beneficiary, etc.), please use our **BlackRock CollegeAdvantage® 529 Change of Registration Form**.

1. Account Information

Please tell us about the account(s) that you wish to make the change(s) on:

Full name of Account owner / Scholarship / Trust

Contact Telephone Number

Full name of Beneficiary

Contact Telephone Number

Social Security Number
(of person whose name is changing)

BlackRock Account Number

Reference Number (if applicable)

Your name will be changed on all accounts under the above Social Security number.

2. Change of Name

Now, please tell us which name is changing and how it should read going forward. This name change is for the:

- Account Owner Beneficiary Successor Owner

The name as it **currently appears** on the account:

First name

M.I.

Last name

The new name as it **should appear** on the account:

First name

M.I.

Last name

(Please provide your signatures on the next page)

3. Signatures

Please sign with both your *old* name and your *new* name. The signature for your **old** name only must be verified by **notary seal**, a **Medallion Signature Guarantee stamp** or a **Signature Verification Stamp**.

I hereby certify that I am of legal age, and that the information contained herein is true and correct. I certify that I, the Successor Owner and my Beneficiary are US Citizens or resident aliens.

To help the U.S. Government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies persons opening accounts. To comply, BlackRock requires the investor's name, address, date of birth and government-issued identification number (generally, a Social Security Number) and other information that may help identify the investor; and may ask for copies of related documentation and may consult third-party databases to help verify the investor's identity. I have read and I understand the prospectus which explains the risks of opening this account if I do not provide all requested identification materials or if my identity cannot be adequately verified in accordance with U.S. Government requirements.

My signature indicates that I have read and agree to the terms of (i) the current Program Description, including any supplements and amendments), (ii) the Participation Agreement dated September 3, 2019 or later and (iii) this Form, each as relating to the BlackRock CollegeAdvantage 529 Savings Plan offered exclusively through the Tuition Trust. I understand that I should consult a financial or legal advisor if I have questions about these terms.

If the Program Administrator is unable to verify the Account Owner's identity, this account will be closed and the assets in the account distributed at the then-current unit value. I understand that under federal tax law any rollover of such distribution to another Qualified Tuition Program that will accept it must occur within 60 days. If I have any additional questions concerning the tax consequences of any such distribution, I will refer to the "Tax Information" section of the Program Description and Participation Agreement or consult my professional tax advisor.

Tax Certification - Under penalties of perjury, I/we certify that:

- ▶ The number shown on this form is the correct taxpayer identification number, and
- ▶ The investor is not subject to backup withholding because the investor: (a) is exempt from backup withholding, or (b) has not been notified by the Internal Revenue Service (IRS) that the Investor is subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified the investor that they are no longer subject to backup withholding, and
- ▶ The applicant is a U.S. person (including a U.S. resident alien) or
- ▶ Alternatively, under penalties of perjury, the applicant certifies that they are subject to withholding. If so, check here:
- ▶ The FATCA code(s) entered on this form (if any) indicating the investor is exempt from FATCA reporting is correct. CODE: _____

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.



Sign your **OLD** name (exactly as registered on the account)

Sign your **NEW** name (as it *will appear* on the account)

If the beneficiary is a minor, Account owner should sign here

Date(mm/dd/yyyy)



For Notary Public:

State of _____ County of _____

On this ____ day of _____, 20____, before me, the undersigned Notary Public, _____, personally appeared and proved through satisfactory evidence of Identification to be the person whose name is signed above and acknowledged by:

Signature of Notary Public

Not FDIC Insured | May Lose Value | No Bank Guarantee

© 2020 Blackrock, Inc. All Rights Reserved. BLACKROCK is a registered trademark of BlackRock, Inc. or its subsidiaries in the United States and elsewhere. All other trademarks are those of their respective owners.

Lit. No. 529-CHNGNAME-0120