

Coverdell Education Savings Account

Change of Death Beneficiary

Use this form to update the Death Beneficiary designation for the indicated Coverdell Education Savings Account (ESA). The Death Beneficiary is a contingent beneficiary to the Designated Beneficiary of the account. Please refer to the Coverdell Education Savings Account Agreement for further information on death beneficiary options.

Do not use this form to update the Responsible Individual or Designated Beneficiary of the Coverdell ESA account.

Fields noted with an asterisk (*) are required.

1. Current Account Information

Responsible Individual (Parent/Guardian of Designated Beneficiary)

Name		Social Security/Tax ID No.*	
Mailing Address	City	State	Zip Code
Day Telephone	Evening Telephone	Cell Telephone	
Email Address			

Check here if contact information above is new. The new information will replace the information currently on file.

Designated Beneficiary of Coverdell ESA

Name	Social Security/Tax ID No.*
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2. Death Beneficiary Designation

The previous Death Beneficiary designation will be replaced with the designation below.

The Death Beneficiary may be changed at any time by giving written notice to the Custodian.

If the named Death Beneficiary is an eligible family member (under age 30 upon the death of the Designated Beneficiary) this account can be rolled over to a Coverdell ESA account for the named Death Beneficiary. If the named Death Beneficiary is not eligible to rollover this account upon the death of the Designated Beneficiary, all assets will be paid to the Death Beneficiary.

I, the Responsible Individual, designate the following to receive any benefits to which the Death Beneficiary may be entitled in the event of the death of the Designated Beneficiary.

Name of Beneficiary*		Social Security/Tax ID No.*	
Mailing Address*	City*	State*	Zip Code*
Birthdate (mm/dd/yyyy)*	Relationship*		

3. Responsible Individual's Authorization

Signature of Responsible Individual	Date
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