

**CHANGE OF**  
**BENEFICIARY FORM**

CONTRACT NUMBER: \_\_\_\_\_ PURCHASER'S NAME: \_\_\_\_\_

ORIGINAL BENEFICIARY: \_\_\_\_\_ HS GRADUATION YEAR \_\_\_\_\_

**Type of Change**

- Without Usage (No benefits have been disbursed against the contract yet)
- With usage – (Some of the contract benefits have been disbursed for the current beneficiary.) Note: New beneficiary must use within the 6-year time limit of the original beneficiary if contract has usage. No expiration date extensions will be granted for new beneficiary. A beneficiary may have multiple contracts but cannot exceed 120 credit hours amongst all contracts.

**Reason for Transfer, Current Beneficiary**

- Deceased (Fee waived with certificate)     Not Attending Higher Education     Received Scholarship
- Graduated College and Has Remaining Credits     Other (please specify) \_\_\_\_\_
- Check this box to certify that the new qualified beneficiary is younger or no more than 3 years older than the current beneficiary and A FAMILY MEMBER PER THE CRITERIA AS SPECIFIED IN THE MASTER AGREEMENT.**

**New Beneficiary Information**

NEW BENEFICIARY NAME: \_\_\_\_\_ SSN: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ County: \_\_\_\_\_

PHONE # \_\_\_\_\_ BIRTHDATE: \_\_\_\_\_ SEX:  MALE     FEMALE

EMAIL: \_\_\_\_\_

RELATIONSHIP TO ORIGINAL BENEFICIARY: \_\_\_\_\_ PROJECTED COLLEGE ENROLLMENT YEAR: \_\_\_\_\_

**TO AUTHORIZE THIS CHANGE OF BENEFICIARY, PLEASE SIGN THIS COMPLETED FORM IN THE PRESENCE OF A NOTARY.**

\_\_\_\_\_  
Purchaser's Signature

\_\_\_\_\_  
Date

State of \_\_\_\_\_ County of \_\_\_\_\_

I certify that I know or have satisfactory evidence that \_\_\_\_\_ is the person who appeared before me, and said person acknowledged that he/she signed this instrument and acknowledged it to be (his/her) free and voluntary act for the uses and purposes in the instrument.

Notary Signature \_\_\_\_\_ Date \_\_\_\_\_

My Appointment Expires \_\_\_\_\_

(stamp or seal)

**PLEASE SEND THE COMPLETED FORM AND THE \$20.00 CHANGE OF BENEFICIARY FEE TO THE ADDRESS BELOW. CONFIRMATION WILL BE MAILED TO THE PURCHASER UPON COMPLETION OF THE CHANGE.**

