



UGMA/UTMA Account Update Form

Return this Form to:

Bright Start College
Savings Program
P.O. Box 85298
Lincoln, NE 68501

Overnight Mail:

Bright Start College
Savings Program
6811 South 27th Street
Lincoln, NE 68512

If you have questions, please call us at **877.432.7444**,
Monday–Friday, 7 a.m. to 7 p.m. (Central).

1. Current Account Information

Account Number: _____

Current UGMA/UTMA Custodian Name (First, M.I., Last): _____

Daytime Phone Number: _____ Evening Phone Number: _____

Name of Beneficiary: _____

2. Change Current Custodian

(Medallion Signature Guarantee **REQUIRED** in Section 5. The new Custodian must complete and enclose an Enrollment Form.)

New UGMA/UTMA Custodian Information:

Name (First, M.I., Last): _____

Social Security Number or Taxpayer Identification Number: _____

Date of Birth (MM/DD/YYYY): _____

Street Address (no PO Boxes) _____

City, State, Zip: _____

Daytime Phone Number: _____ Evening Phone Number: _____

Email Address: _____

3. Add a Successor Custodian

(A successor custodian becomes the custodian if the current custodian dies, resigns, or is declared legally incompetent.)

UGMA/UTMA Successor Custodian Name (First, M.I., Last): _____

UGMA/UTMA Successor Custodian Date of Birth (MM/DD/YYYY): _____

UGMA/UTMA Successor Custodian City, State: _____

4. Authorization

By signing below, I hereby certify that I am the current Custodian of the UGMA/UTMA Account indicated on this form and that the information contained herein is true, complete, and correct.

If I have completed Section 2, I hereby resign as Custodian. THIS FORM MUST BE MEDALLION SIGNATURE GUARANTEED IN SECTION 5. The new Custodian has completed and enclosed a new Enrollment Form.

If I have completed Section 3, this successor Custodian designation will replace the successor custodian currently named on the Account and is effective only upon my death, my resignation as custodian, or my legal incapacitation.

Signature and Date Required

X

Signature of Custodian

Date

Print Name Here

5. Medallion Signature Guarantee (REQUIRED When Changing Custodian's in Section 2.)

A Medallion Signature Guarantee of the signature in Section 4 is required when Changing Custodian's in Section 2.

MEDALLION SIGNATURE GUARANTEE

Signature must be stamped with a Medallion Signature Guarantee by a qualified financial institution, such as a commercial bank, savings and loan, U.S. stock broker and security dealer, or credit union, that is participating in an approved Medallion Signature Guarantee program.

(A NOTARY PUBLIC CANNOT PROVIDE A SIGNATURE GUARANTEE)

Note to Guarantor:
Medallion imprints must be fully legible and must not be dated or annotated.



Michael W. Frerichs
ILLINOIS STATE TREASURER

Trustee & Administrator

UBT

Union Bank & Trust

Program Manager