

Important Information

Fill out this form to designate a Contingent Account Owner to become the owner of your selected Account automatically upon your death. This designation is not revoked by will or codicil, but may be automatically revoked due to a change in circumstance like divorce. The Contingent Account Owner must complete an Application to Transfer Ownership of Account upon your death. See the Program Disclosure Booklet for further details. **To change the Designated Beneficiary, you must complete a Change of Beneficiary Form.**

The Contingent Account Owner that you designate on this form will be the owner of your Account upon your death. Upon your death, the Contingent Account Owner must submit a certified copy of your death certificate or other legally recognized proof of death to the Program before ownership of the account can be transferred. The Contingent Account Owner must also complete and submit a new Account Application.

Mailing Instructions

Please return this form in the enclosed business reply envelope. If you do not have a business reply envelope, use a stamped envelope and send to:

Independent 529 Plan
P.O. Box 55191
Boston, MA 02205-8217

Tuition Plan Consortium, LLC
Program Sponsor

TIAA-CREF Tuition Financing, Inc.
Program Manager

