

### Important information about this form:

- Fill out this form to change the name of the Beneficiary or the Authorized Legal Representative for this ABLE account.
- If you're an Authorized Legal Representative managing more than one account with a name change, you'll have to fill out a separate form for each one.
- The Beneficiary or the Authorized Legal Representative must sign this form.
- A name change requires a Medallion Signature Guarantee in **Step 4**.
- The name associated with the ABLE account must match the first and last name on the bank account connected to it. If you are making a change of name, you might also have to update your bank account information.

### Need help?

Give us a call Monday – Friday  
from 9am – 8pm ET at  
**1-844-394-2253** or  
**1-844-888-2253 (TTY)**

### Mail the form to:

ABLE for ALL Savings Plan  
P.O. Box 9891  
Providence, RI 02940-8091

### Overnight Mail:

ABLE for ALL Savings Plan  
4400 Computer Drive  
Westborough, MA 01581

## 1 ABLE account information

\_\_\_\_\_  
Name of the Beneficiary on the ABLE account (First and last)

\_\_\_\_ \_ - \_\_\_\_ - \_\_\_\_ \_  
Beneficiary's Social Security or Taxpayer Identification Number

\_\_\_\_ \_ - \_\_\_\_ \_ - \_\_\_\_ \_ - \_\_\_\_ \_  
ABLE for ALL Savings Plan account number

## 2 Tell us about the name change

**If you need to make a name change for both the Beneficiary and the Authorized Legal Representative, you will need to fill out two separate forms. Both forms will require a Medallion Signature Guarantee.**

This change is for:     Beneficiary     Authorized Legal Representative

\_\_\_\_\_  
New name (First and last)

Reason for change:     Marriage     Divorce     Other: \_\_\_\_\_

### 3 Sign the form

By signing this form, you're confirming the information you've provided is true for the change of name.

\_\_\_\_\_  
Signature of Beneficiary or Authorized Legal Representative

\_\_\_\_\_  
Date (mm/dd/yyyy)

### 4 A Medallion Signature Guarantee is required for a name change

**Keep in mind that:**

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn't qualify, and you cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the ABLE account.
- **Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.**

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Plan Disclosure Booklet**.

\_\_\_\_\_  
Signature of Beneficiary or Authorized Legal Representative

\_\_\_\_\_  
Signature Guarantor

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Institution

\_\_\_\_\_  
Date (mm/dd/yyyy)

**Have the Authorized Officer stamp here**