



# NextGen College Investing Plan<sup>®</sup>

## Change of Participant Form

Complete this form if you would like to transfer all of your assets from your NextGen College Investing Plan Account (“NextGen Account”), listed below, to a new Participant. Along with this form, a NextGen Account Application must also be completed and signed by the new Participant. Upon the change of Participant on a NextGen Account, the new Participant assumes all rights of ownership described in the NextGen Program Description, including but not limited to the ability to change investments, change the Designated Beneficiary and direct withdrawals from the NextGen Account.

This form may be used only to change the Participant on the account. If the new Participant wishes to change the Designated Beneficiary, the new Participant must complete a Change of Designated Beneficiary form in addition to this form. To obtain a Change of Designated Beneficiary form, contact your Financial Advisor, log in to your account on [www.merrilledge.com](http://www.merrilledge.com) or download a copy from [www.nextgenplan.com](http://www.nextgenplan.com).

**Note:** This form may not be used to change the Participant on NextGen Accounts opened online. Visit [www.merrilledge.com](http://www.merrilledge.com) to obtain the Change of Participant form for Merrill Edge Self-Directed NextGen Accounts.

### 1. Current Participant Information

_____ Name (Last/First/M.I.) or Name of Custodianship/Trust/Corp.	_____ Date of Birth (month/day/year)
_____ Social Security Number	_____ Street Address (no P.O. Box)
_____ NextGen Account Number	_____ City State ZIP Code

### 2. New Participant Information

_____ Name (Last/First/M.I.) or Name of Custodianship/Trust/Corp.	_____ New Participant Phone Number
_____ Street Address (no P.O. Box)	_____ Date of Birth (month/day/year)
_____ City State ZIP Code	_____ Social Security Number
_____ Mailing Address (if different from street address)	
_____ City State ZIP Code	

### 3. Current Participant Signature

I certify that the instructions and information provided herein are true and correct and comply with the NextGen College Investing Plan Program Description and Participation Agreement. By signing below, I acknowledge that I understand the consequences of this transfer and agree that this transfer is irrevocable and transfers all rights, title, interest and power (including the power to use the NextGen assets for any purpose) over the NextGen Account and its assets to the new Participant designated herein.

X _____	_____
<b>Signature of Current Participant</b>	<b>Date</b>

### 4. New Participant Signature

I hereby apply for a NextGen College Investing Plan Account and consent and agree to all the terms and conditions of the NextGen College Investing Plan Participation Agreement, which is incorporated herein by reference. I acknowledge that I have read both the NextGen College Investing Plan Program Description, the Participation Agreement and Bank of America Privacy Policy, and will retain a copy of each for my records. If I have a Merrill Lynch central asset account, I further acknowledge and agree that the Participation Agreement will govern all aspects of the NextGen Account, including all contributions to my NextGen Account. If I have a Merrill Lynch central asset account, I authorize regular statements for my NextGen Account to be mailed to the address of the Merrill Lynch central asset account to which the NextGen Account may be linked.

BY SIGNING BELOW, I ACKNOWLEDGE: (1) THAT I AM IN RECEIPT OF A COPY OF THE NEXTGEN COLLEGE INVESTING PLAN PROGRAM DESCRIPTION AND PARTICIPATION AGREEMENT AND SUPPLEMENT(S) AND (2) THAT IN ACCORDANCE WITH PARAGRAPH 23 OF THE PARTICIPATION AGREEMENT (ON THE LAST PAGE(S) OF THE PROGRAM DESCRIPTION AND PARTICIPATION AGREEMENT ), I AM AGREEING IN ADVANCE TO ARBITRATE ANY CONTROVERSIES WHICH MAY ARISE WITH THE PROGRAM MANAGER:

X _____	_____
<b>Signature of New Participant</b>	<b>Date</b>

**NOTE: CONTRIBUTIONS TO, OR WITHDRAWALS FROM, THIS PROGRAM MAY BE TREATED LESS FAVORABLY FOR STATE INCOME-TAX AND OTHER PURPOSES THAN CONTRIBUTIONS TO A SECTION 529 PROGRAM OFFERED BY THE STATE IN WHICH THE INVESTOR RESIDES OR PAYS TAXES.**

**PLEASE FOLLOW THESE MAILING INSTRUCTIONS TO AVOID DELAYS IN PROCESSING**

For clients serviced by:

**Merrill Lynch Financial Advisor**

Return to: Address specified on your NextGen Account statement,  
or contact the Merrill Lynch office servicing your accounts.

**Merrill Edge Advisory Center™, Maine Distribution Agent / College Plan Services**

Return to: Merrill Lynch  
P.O. Box 29002  
Hot Springs, AR 71903

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Merrill Edge® is the marketing name for two businesses: Merrill Edge Advisory Center, which offers team-based advice and guidance brokerage services; and a self-directed online investing platform.

Merrill Lynch makes available products and services offered by MLPF&S and other subsidiaries of Bank of America Corporation (“BAC”).

**Investment products:**

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
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Merrill Lynch, Pierce, Fenner & Smith Incorporated, Program Manager



**Program Administrator**

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