



# NextGen College Investing Plan®

## Change of Participant Form

Complete this form if you would like to transfer all of your assets from your NextGen College Investing Plan® Account (the "NextGen® Account"), listed below, to a 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, the Merrill Edge Advisory Center™, call toll-free (877) 4-NEXTGEN (463-9843) or download a copy from [www.nextgenplan.com](http://www.nextgenplan.com).

### 1. Current Participant Information

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

### 2. New Participant Information

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

### 4. New Participant Signature

I hereby apply for the NextGen College Investing Plan Account and consent and agree to all the terms and conditions of the NextGen College Investing Plan Participation Agreement (the "Participation Agreement"), which is incorporated herein by reference. I acknowledge that I have read both the Participation Agreement and the NextGen College Investing Plan Program Description 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 BOOKLET 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 BOOKLET), I AM AGREEING IN ADVANCE TO ARBITRATE ANY CONTROVERSIES WHICH MAY ARISE WITH THE PROGRAM MANAGER:

X _____	_____
Signature of New Participant	Date

**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/  
Merrill Edge Advisory Center™**

Return to: **Address specified on your NextGen Account statement.**

**If you need assistance, please call (877) 4-NEXTGEN (463-9843).**

**Maine Distribution Agent / College Plan Services**

Return to: **College Plan Services**

**P.O. Box 1518**

**Pennington, NJ 08534-1518**

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**Program Administrator**

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