

Important information about this form:

- Fill out this form to add, change or remove a Successor Owner from the Oregon College Savings Plan account.
- The role of the Successor Owner does not apply to UTMA/UGMA accounts.
- A trust must already be established if you want to designate the trust as the Successor Owner.
- The Successor Owner is eligible to inherit the account if the Account Owner dies or becomes incapacitated.
- The Successor Owner must be at least 18 years old. An adult Beneficiary can also be the Successor Owner.

Need help?

Give us a call Monday – Friday
from 6am – 5pm PT at

1-866-772-8464

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

Oregon College Savings Plan
P.O. Box 534440
Pittsburgh, PA 15253- 4440

Overnight Mail:

Oregon College Savings Plan
Attention: 534440
500 Ross Street, 154-0520
Pittsburgh, PA 15262

Fax

833-286-8172

1 Account information

Name of Account Owner (First and last)

____ - ____ - ____ - ____ - ____
Account Owner's Social Security or
Taxpayer Identification Number

____ - ____ - ____ - ____ - ____ - ____
Account number
(Your account number may be 12 or 13 digits)

2 Manage Successor Owner information

- Add a Successor Owner
- Change the Successor Owner
- Remove the Successor Owner (Skip to **Step 4**)

3 Successor Owner information

Fill out this step to add or change a Successor Owner for this account.

The Successor Owner must be at least 18 years old.

Name (First and last)

____ / ____ / ____ - ____
Date of birth (mm/dd/yyyy)

____ - ____ - ____ - ____ - ____
Social Security or Taxpayer Identification Number

4 Sign the form

By signing this form, you're confirming the information you've provided is true for the Successor Owner.

Signature of Account Owner

Date (mm/dd/yyyy)