UGMA/UTMA Notification Form

Bright Directions College Savings Program
PO Box 82623 1-866-722-7283
Lincoln, NE 68501 www.brightdirections.com

Use this form to

Notify the Bright Directions College Savings Program that a minor child listed as Beneficiary on an account funded with State UGMA/UTMA funds has reached age of majority according to the applicable State UGMA/UTMA statute.

Instructions

- Please complete all sections that apply and return this form along with a **new Enrollment Form** to: Bright Directions, PO Box 82623, Lincoln, NE 68501.
- This form must be signed and dated. A Medallion Signature Guarantee is required.
- If you have any questions regarding this form, please call your Financial Advisor or Bright Directions at 1-866-722-7283.

1 Account Information

Account Number *(If available)* ☐☐☐☐☐☐☐☐☐ ☐☐☐ For Office Use Only

Custodian

Check one: ❒ Mr. ❒Mrs. ❒Ms. ❒ Dr.

Custodian's First Name MI Last Name

E-mail address _____ Daytime Phone ( ) _____

☐☐☐–☐☐–☐☐☐☐
Custodian's Social Security Number

Beneficiary

Beneficiarys First Name MI Last Name

E-mail address _____ Daytime Phone ( ) _____

☐☐☐–☐☐–☐☐☐☐
Beneficiary's Social Security Number

2 Authorization

I certify that the Beneficiary named above has attained the appropriate legal age under the applicable State statutes and rules governing the UGMA/UTMA account. As custodian of the UGMA/UTMA, I direct that you change the ownership of the above-referenced Account to the Beneficiary. I understand that once the change has been completed the Beneficiary of the above-referenced Account will become the new Account Owner and will be eligible for all benefits and will accrue all rights and obligations of an Account Owner as described in the Program Disclosure Statement.

X _____ Date _____

Signature of Custodian

(Print Name Here) _____

MEDALLION SIGNATURE GUARANTEE

Note to Guarantor:
Medallion imprints must be fully legible and must not be dated or annotated.

Signature must be stamped with a Medallion Signature Guarantee by a qualified financial institution, such as a commercial bank, savings and loan, U.S. stock broker and security dealer, or credit union, that is participating in an approved Medallion Signature Guarantee Program. (A NOTARY SEAL IS NOT ACCEPTABLE.)

Alexi Giannoulias
Illinois State Treasurer
Trustee & Administrator

UNION BANK & TRUST COMPANY
Program Manager