

3 Add, Change or Revoke Contingent Account Owner Information *(if applicable, for Individual Accounts only)*

The Contingent Account Owner (CAO) must be eligible to become an Account Owner in the event of death of the current Account Owner. The CAO must be a U.S. citizen or resident alien, including a Trust, and must have a Social Security or Taxpayer Identification Number. Any designation you make here may be changed at a future date.

Please check the appropriate box:

<input type="checkbox"/> Add a Contingent Account Owner for the first time	<input type="checkbox"/> Change an Existing Contingent Account Owner Designation	<input type="checkbox"/> Revoke a Contingent Account Owner Designation
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New Contingent Account Owner Information *(Provide this information to add or change a Contingent Account Owner.)*

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Name (First, MI, Last, Suffix), or Name of Trust (Foreign trusts are not eligible.)

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Trustee Name (First, MI, Last, Suffix), if a Trust named above

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Social Security Number or Taxpayer ID Number

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Gender (M/F)

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Date of Birth, or Date of Trust Agreement

Check this box if the Contingent Account Owner lives with the Account Owner. If so, do not provide an address in the boxes below.

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Residential Address (This must be a street address - a P.O. Box is not acceptable under the U.S. Patriot Act.)

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City, State, Zip, Country (if foreign address)

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Day Telephone Number

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Evening Telephone Number

4 Signature and Authorization *(This section must be signed for these changes to take effect.)*

By signing below, I/we intend to change the Account Owner, Beneficiary and/or Contingent Account Owner (CAO) information on this Account as indicated on this *Account Services Form*. If I/we have changed the address, I/we understand that a withdrawal cannot be processed for 30 days, unless a medallion signature guarantee² appears below. If I/we have designated a CAO, then I/we understand that this form, rather than a will or codicil, should be used to change or revoke my CAO designation. In addition, I/we understand that ownership of this Account cannot be transferred to the designated CAO unless that individual is eligible to be an Account Owner as described in the *Disclosure Booklet*, and upon submission of an acceptable proof of death and a new *Account Application*. I/we will notify the CAO of this designation.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. (If I am an individual acting in a legal capacity as a representative of the Account Owner, or an entity Account Owner, a Signature Validation Program Stamp appears below.)¹

Signature of Current Account Owner, Custodian or Authorized Representative of an Individual or Entity Account Owner Date

Signature of Joint Account Owner, if applicable Date

IMPORTANT INFORMATION

A Signature Validation Program Stamp is required for all entity Accounts or Accounts in which the individual completing this form is acting in a legal capacity as a representative of the individual Account Owner. You may be required to provide proof of your authority to act on behalf of this Account to your bank or broker before a Signature Validation Program Stamp will be provided.

Note: A Signature Validation Program Stamp is not required if a *Plan Power of Attorney Form* is on file for an Individual Account, or if a *Plan Power of Attorney Form* accompanies this form.

AFFIX SVP STAMP HERE



**Mail this form to:
Regular Mail**

Connecticut Higher Education Trust
P.O. Box 150499
Hartford, CT 06115-0499

Program Management by TIAA-CREF Tuition Financing, Inc.

CT1011.ASF/A12305

² Certain commercial banks, trust companies, savings associations, credit unions and members of the United States stock exchange participate in the medallion signature guarantee program. A notary public **cannot** provide a medallion signature guarantee. Please contact your bank or broker for assistance, if required.