

Important information about this form:

- Fill out this form to change the address of the Account Owner/Custodian or Beneficiary.
- Submit a separate form for each unique address change.
- All account communications and statements are sent to the mailing address on file.
- You must wait 30 days from when you make an address change before you can make a check withdrawal unless you provide a Medallion Signature Guarantee (**Step 5**).
- A Medallion Signature Guarantee is required for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner (**Step 5**).

Need help?

Give us a call Monday – Friday
from 6am – 5pm PT at
1-866-772-8464 or
1-844-888-2253 (TTY)

Mail the form to:

Oregon College Savings Plan
P.O. Box 9651
Providence, RI 02940-9651

Overnight Mail:

Oregon College Savings Plan
4400 Computer Drive
Westborough, MA 01581

1 Oregon College Savings Plan account information

Name of Account Owner (First and last)

____ _ – ____ _ – ____ _
Account Owner's Social Security or Taxpayer Identification Number

OS ____ _
Oregon College Savings Plan account number
(for account numbers less than 11-digits, please use leading zeros)

2 Who is this address change for?

(Select all that apply if the addresses are the same)

- Account Owner/Custodian's residential address
- Beneficiary's residential address
- Mailing address

3 New address

If you're updating either the Account Owner/Custodian's or Beneficiary's address, it cannot be a P.O. box.

_____		_____	
Street address 1		Street address 2	
_____		_____	_____
City		State	ZIP Code

Telephone number			

4 Sign the form

By signing this form, you're confirming the information provided is true for the change of address.

You must wait 30 days from when you make an address change before you can make a check withdrawal to this address unless you provide a Medallion Signature Guarantee (**Step 5**).

_____	_____
Signature of Account Owner/Custodian/Authorized Representative of Entity	Date (mm/dd/yyyy)

5 Medallion Signature Guarantee

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn't qualify, and you cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the Oregon College Savings Plan account.
- **Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.**

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Plan Disclosure Booklet**.

Signature of Account Owner/Custodian/Authorized Representative of Entity

Signature Guarantor

Title

Name of Institution

Date (mm/dd/yyyy)

Have the Authorized Officer stamp here