



# Change of Name Form

## Important information about this form:

- Fill out this form to change the name of the Account Owner/Custodian or Beneficiary.
- A separate form should be submitted for each individual listed on the account who is changing their name.
- A Medallion Signature Guarantee is required for the Account Owner's change of name in **Step 4**.
- If the change of name is for the person who owns a bank account connected to the Oregon College Savings Plan account, you might need to update that bank account information as well.
- 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 4**).

## 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 Name change

Who is this change of name for? (Select one)

- Account Owner/Custodian  
(A Medallion Signature Guarantee is required to change the Account Owner's name in **Step 4**)
- Beneficiary

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Old name (First and last)

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New name (First and last)

Reason for change:  Marriage  Divorce  Other: \_\_\_\_\_

## 3 Sign the form

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

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Signature of Account Owner/Custodian/Authorized Representative  
of Entity

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Date (mm/dd/yyyy)

## 4 A Medallion Signature Guarantee is required for a name change

**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**