



Manage Successor Owner Form

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 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 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 Oregon College Savings Plan 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)