



3 Designated Beneficiary's New Name

Complete this section to change the Designated Beneficiary listed in the account registration.

- The account owner should complete this section.
- For custodial 529 accounts, the custodian should complete this section.
- Please enter the Designated Beneficiary's new name. Note: A Medallion Signature Guarantee is required.

I authorize MFS to change the Designated Beneficiary's name for the account(s) registration provided Section 1 from his/her former name

Former Name

to his/her new name _____

New Name

Signature of Account Owner or Custodian

___ ___ / ___ ___ / ___ ___ ___ ___
Date (MM/DD/YYYY)



MFS® 529 Savings Plan Name Change Authorization Form

4 Authorization

Complete this section only if your bank information on file has changed. To add new bank information to your account, please complete the MFS 529 Savings Plan Account Maintenance Form.

Note: To update any other service options please complete the MFS 529 Savings Plan Account Maintenance Form.

Type of Account: Checking Savings

Name on Checking/Savings Account (Required)

Bank Name (Required)

Name on Checking/Savings Account (Required)

Bank Name (Required)

Medallion Signature Guarantee

AFFIX GUARANTEE STAMP HERE

The signature(s) must be guaranteed by an eligible bank, broker, dealer, credit union, national securities exchange registered securities association, clearing agency, or savings association. Medallion Signature Guarantees shall be accepted in accordance with policies established by the MFS 529 Savings Plan. Notarization by a Notary Public is not acceptable in lieu of a Medallion Signature Guarantee provided by one of the eligible guarantor institutions listed above.