

MFS® 529 Savings Plan Name Change Authorization Form

Current Account Owner's Name (First and last) Current Designated Beneficiary's Name (First and last) Mailing Address			Need help? Give us a call Monday – Friday from 8am – 7pm ET at 1-888-529-0063 Mail the form to: MFS 529 Savings Plan P.O. Box 534454 Pittsburgh, PA 15253-4454 Overnight Mail: MFS 529 Savings Plan Attention: 534454				
				City	State	Zip Code	500 Ross Street, 154-0520 Pittsburgh, PA 15262
				Social Security Number			Fax: 844-756-9471
Phone Number This is my new ad	dress; please update my	account information					
☐ This is my new ad Note: If the new a	ddress is a non-U.S addre purchases into this accou	ess, you will be restricted from					
This is my new ad Note: If the new a making additional Account Owner	ddress is a non-U.S addre purchases into this accou	ess, you will be restricted from	names. A Medallion Signature				
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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	/ / / /





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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. Name on Checking/Savings Account (Required) **Bank Name (Required)** Name on Checking/Savings Account (Required) **Bank Name (Required) Medallion Signature Guarantee** The signature(s) must be AFFIX GUARANTEE STAMP HERE 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.

