



# UGMA/UTMA Notification Form

PO Box 82644  
Lincoln, NE 68501

**Use this form to:**

Notify the College Savings Plan of Nebraska that a minor child listed as Beneficiary on an account funded with State UGMA/UTMA funds has reached the age of majority according to the applicable State UGMA/UTMA statute.

**Instructions.**

- Please complete all sections and return this form along with a new Enrollment Form to the College Savings Plan of Nebraska, PO Box 82644, Lincoln, NE 68501. The new Enrollment Form must be signed by the new Account Owner (the minor child who has now reached the age of majority under the applicable UGMA/UTMA statute).
- This form must be signed and dated. Please allow approximately 5 business days for this change to be completed.
- If you have any questions regarding this form, please contact us at 1-888-993-3746.

**Section 1. Account Number**

\_\_\_\_\_

**Section 2. Custodian Information**

\_\_\_\_\_  
Custodian's Name

(\_\_\_\_\_) \_\_\_\_\_  
Home Phone

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
Social Security Number

**Section 3. Beneficiary Information**

\_\_\_\_\_  
Beneficiary's Name

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
Social Security Number

**Section 4. New Account Owner Name**

\_\_\_\_\_  
New Account Owner's Name

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
Social Security Number

**Section 4. Authorization** I certify that the Beneficiary named above has attained the appropriate legal age under the applicable State statutes and rules governing the UGMA/UTMA account. As custodian of the UGMA/UTMA, I direct that you change the ownership of the above-referenced Account to the Beneficiary. I understand that once the change has been completed the Beneficiary of the above-referenced Account will become the new Account Owner and will be eligible for all benefits and will accrue all rights and obligations of an Account Owner as described in the Enrollment Handbook.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

X \_\_\_\_\_  
Signature of Current Account Owner (current UGMA/UTMA Custodian)

**SIGNATURE GUARANTEE**

Please affix signature guarantee along with authorized signature, title and date.

A Signature Guarantee is required. A Signature Guarantee is a stamped or typed assurance by a financial institution that indicates a signature is valid. It may be obtained at most financial institutions or banks