

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 DreamAhead 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
1-844-529-5845 or
1-844-888-2253 (TTY)

Mail the form to:

DreamAhead College
Investment Plan
P.O. Box 9661
Providence, RI 02940-9661

Overnight Mail:

DreamAhead College
Investment Plan
4400 Computer Drive
Westborough, MA 01581

1 DreamAhead account information

Name of Account Owner (First and last)

____ _ - ____ - ____ _
Account Owner’s Social Security or Taxpayer Identification Number

____ _
DreamAhead account number

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

Old name (First and last)

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.

Signature of Account Owner/Custodian/Authorized Representative
of Entity

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 DreamAhead 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 **Program Details 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