

## CHANGE OF BENEFICIARY FORM

- The College Illinois!® contract Purchaser must complete, sign, and have this form **notarized** to change the Beneficiary on the existing contract.
- If the projected enrollment year of the new beneficiary is earlier than the current beneficiary, please call Customer Service at our toll-free number, 1-877-877-3724 before you complete form to determine if an additional actuarial charge will be assessed.
- Mail completed form with \$15 fee to College Illinois!, P.O. Box 44030, Jacksonville FL 32231-4030 or submit through the Upload Documents section of online account access at collegeillinois.org. You may pay electronically through online account access. Payment is due at the time you submit this form. Written confirmation will be sent to the Purchaser when the change has been processed.
- Questions should be directed to Customer Service at our toll-free number, 1-877-877-3724.

### Current Contract Information

College Illinois! Account Number \_\_\_\_\_

Current Purchaser \_\_\_\_\_ Daytime Phone Number \_\_\_\_\_

Current Beneficiary \_\_\_\_\_

### New Beneficiary Information

Name (First, Middle, Last, Suffix) \_\_\_\_\_

Social Security Number (or T.I.N.) \_\_\_\_\_ Date of Birth \_\_\_\_\_  
(College Illinois! requires a SSN solely for administration purposes and, where applicable, IRS reporting.)

Street Address/PO Box/Apt. # \_\_\_\_\_

City / State / Zip Code \_\_\_\_\_

Daytime Telephone Number \_\_\_\_\_

Relationship to Original Beneficiary \_\_\_\_\_

Current Age/Grade in School \_\_\_\_\_ Projected College Enrollment Year \_\_\_\_\_

**I certify that the new Beneficiary submitted meets the criteria as specified in Disclosure Statement and Master Agreement.**

Signature of Purchaser \_\_\_\_\_ (Notary must witness signature) \_\_\_\_\_ Date \_\_\_\_\_

### Notary Section

I certify that I know or have satisfactory evidence that \_\_\_\_\_ is the person who appeared before me, and said person acknowledged that he/she signed this instrument and acknowledge it to be his/her free and voluntary act for the uses and purposes mentioned in the instrument.

Signature of Notary \_\_\_\_\_ Date \_\_\_\_\_ (Seal or Stamp)

#### NOTICE

Purchasers who knowingly supply fraudulent documentation will be denied the opportunity to participate in the program. In the event a College Illinois! contract has been revised based upon fraudulent documentation, the contract will be terminated subject to the assessment of a termination charge up to \$500.