

Important information about this form:

- Fill out this form to change the name of the Beneficiary or the Authorized Legal Representative for this ABLE account.
- If you're an Authorized Legal Representative managing more than one account with a name change, you'll have to fill out a separate form for each one.
- The Beneficiary or the Authorized Legal Representative must sign this form.
- A name change requires a Medallion Signature Guarantee on **Step 4**.
- The name associated with the ABLE account must match the last name on the bank account connected to it. If you are making a change of name, you might also have to update your bank account information.

Need help?

Give us a call Monday – Friday
from 9am – 5pm PT
at **1-844-999-ABLE** or
from 6am – 5pm PT at
1-844-888-ABLE (TTY)

Mail the form to:

Oregon ABLE Savings Plan
P.O. Box 9891
Providence, RI 02940-8091

Overnight Mail:

Oregon ABLE Savings Plan
4400 Computer Drive
Westborough, MA 01581

1 Fill out your account information

Name of the Beneficiary on the ABLE account (First and last)

____ - ____ - ____ - ____ - ____
Beneficiary's Social Security or Taxpayer Identification Number

Oregon ABLE Savings Plan number

2 Tell us about the name change

If you need to make a name change for both the Beneficiary and the Authorized Legal Representative, you will need to fill out two separate forms. Both forms will require a Medallion Signature Guarantee.

This change is for: Beneficiary Authorized Legal Representative

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 Beneficiary or Authorized Legal Representative

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 ABLE 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 Disclosure Statement.

Signature of Beneficiary or Authorized Legal Representative

Signature Guarantor

Title

Name of Institution

Date (mm/dd/yyyy)

Have the Authorized Officer stamp here