MI529advisor

# Financial Advisor Change Form

***Questions?*** Call 1-866-529-8818
P.O. Box 55070 Boston, MA 02205-5070
Monday - Friday 8:30 a.m. – 6:00p.m. ET

***Instructions***

- Please use this form to change the Financial Advisor information on your MI 529 Advisor Plan Account(s)
- Complete Section 1 and sign Section 3 and forward to your Financial Advisor. Your Financial Advisor will complete and forward to the MI 529 Advisor Plan to effect the change.

## 1 Account Information *(You must provide all requested information.)*

*Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name*

*MI 529 Advisor Plan Account Number(s)*

## 2 New Financial Advisor Information

*Advisor Name* *Rep I.D.*

*Advisor Branch Office Address*

*Advisor's Branch Office Address City* *State* *Zip Code*

*Branch Number* *Telephone Number*

*Dealer Name* *Telephone Number*

*Dealer Home Office Address*

*Dealer Home Office Address City* *State* *Zip Code*

*BIN — Broker Identification Number*

## 3 Signatures

Please use this as your authorization to make the above broker-dealer and financial advisor changes for the Accounts referenced above.

*Client Signature* *Date*

*Signature of Financial Advisor* *Date*



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