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

Address of Account Owner

MI 529 Advisor Plan Account Number(s)

2 New Financial Advisor Information

Name of Financial Advisor

Advisor Branch Number

Advisor ID Number

Telephone Number

- -

Advisor Office Address

Advisor's Office Address City

State

Zip Code

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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