

my529 Account \_\_\_\_\_

Date Received by my529 \_\_\_\_\_

User Initials \_\_\_\_\_

## Form 940 CSA Entity Account Agent Change

### ABOUT THIS FORM

- Complete this form to change the current account agent for a registered CSA Entity's master account and any scholarship accounts owned by the CSA Entity.
- There can only be one account agent for each CSA Entity.

### SUBMITTING THIS FORM

- Please print clearly—preferably in capital letters, using black or blue ink.
- Complete all required information on this CSA Entity Account Agent Change form. If the information you provide is incomplete or cannot be verified, my529 may return the form to you or contact you.
- To ask questions about completing this form, contact my529 toll free at 800.418.2551 on business days from 7 a.m. to 5 p.m. MT.
- Return this form and any required documentation to: my529, PO Box 145100, Salt Lake City, UT 84114-5100. For delivery by overnight carrier, send to: my529, Utah Board of Higher Education Building, Gateway 2, 60 South 400 West, Salt Lake City, UT 84101-1284. You may also fax this form to 800.214.2956.

### 1 CSA Entity Information (Required)

CSA Entity Name

my529 Master Account Number

CSA Entity Taxpayer Identification

### 2 Current Entity Account Agent Information (Required)

Account Agent's Last Name

First Name

Email Address

### 3 New Entity Account Agent Information (Required)

Provide the information below for the new CSA Entity Account Agent. This is the contact person acting on behalf of the Entity and must be authorized by the Entity to act in this capacity. All the Entity's master and scholarship accounts must have the same agent designated to act on its behalf. The Entity Account Agent must enter their own SSN/TIN in this section and cannot use the CSA Entity's TIN.

New Account Agent's U.S. Social Security Number **OR** Taxpayer Identification Number

Date of Birth (mm/dd/yyyy)

Last Name

First Name

Middle Name

Phone Number

Email Address

**Continued on Next Page** 

#### 4a Current Entity Account Agent Signature Authorization (Required)

By signing below, I certify that I will be removed from the role of Entity Account Agent for the Entity listed in Section 1 and will no longer have access to the my529 CSA administrative portal unless I am added as a CSA user by the new Entity Account Agent.



\_\_\_\_\_  
Signature of Current Entity Account Agent

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Title

#### 4b Entity Executive Signature Authorization (Required if the outgoing Entity Account Agent is unable to sign)

If the outgoing Entity Account Agent is unable to sign and authorize the change (i.e., they are no longer an employee of the Entity), an executive of the Entity may complete this portion of the form to provide signature authorization on behalf of the current Entity Account Agent.

By signing below,

- I certify that the current Entity Account Agent is unable to sign and authorize this change.
- I understand that the current Entity Account Agent will be removed from the role of my529 Entity Account Agent for the Entity listed in Section 1.
- I understand that certain functions and online features available only to the Entity Account Agent will no longer be available to the current Entity Account Agent.
- I certify that the individual named in Section 3 is authorized to become the Entity Account Agent.
- I certify that I have the authority to act on behalf of the named Entity and to remove the current Entity Account Agent from the role of my529 Entity Account Agent.



\_\_\_\_\_  
Signature of Entity Executive

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Title

#### 4c New Entity Account Agent Signature (Required)

By signing below,

- I certify that I have the power and authority to sign this form on behalf of named entity.
- I understand that the signature provided below will be used to validate certain transactions.



\_\_\_\_\_  
Signature of New Entity Account Agent

\_\_\_\_\_  
Date (mm/dd/yyyy)

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Title