



For UESP Use Only	○
UESP Account _____	
Date Received by UESP _____	
User Initials _____	

Form 515

Primary/Secondary Successor Owner Designation or Change

- Complete this form to designate, add, or change the current primary or secondary successor owner on your individual UESP account. You may also make these changes using UESP's online Account Access at uesp.org.
- If your account is custodial or institutional, you may not designate a successor account owner.
- Successors must be a U.S. citizen or resident alien, 18 years of age or older, and have a valid U.S. Social Security or Taxpayer Identification Number.
- Please print clearly—preferably in capital letters, using black or blue ink.
- To ask questions about completing this form, contact us toll-free at 800.418.2551 on business days from 8:00 a.m. to 5:00 p.m., Mountain Time.
- Return this form and any required documentation to: UESP, PO Box 145100, Salt Lake City, UT 84114-5100. For delivery by overnight carrier, send to: UESP, Board of Regents Building, Gateway 2, 60 South 400 West, Salt Lake City, UT 84101-1284. You may also fax this form to 800.214.2956.

1 Account Owner/Agent Information

UESP Account Number _____

Account Owner Last Name	First Name	Middle Name	Daytime Phone Number
_____	_____	_____	_____

Account Agent Name (if different) _____

2 Primary Successor Designation or Information Change

- To designate an individual as your primary successor or to change your current primary successor's information, fill out part A. To designate an institution as your primary successor or to change the institution's information, fill out part B.
- The successor/agent must be a U.S. citizen or resident alien, be age 18 or older, and have a valid U.S. Social Security or Taxpayer Identification Number.

A. Primary Successor is an Individual

This is a name change due to marriage or divorce. I have attached legal documentation (e.g., marriage license).

U.S. Social Security Number (Required)	OR	Taxpayer Identification Number (Required)
_____		_____

Last Name	First Name	Middle Name
_____	_____	_____

Date of Birth (mm/dd/yyyy) _____

B. Primary Successor is an Institution (Trust or Corporation)

- To designate or change the primary successor as a trust, you must include a copy of the following pages of the trust document: the title page, signature pages, any pages showing the names of the trustees, and any pages showing the name of a successor trustee.
- To designate or change the primary successor as a corporation or other entity, you must include a copy of the appropriate documents from the institution to show who is authorized to enter into agreements for the institution, along with their signatures.
- The trustee or agent for the institution named below certifies that he or she has the authority and capacity to sign and enter into this agreement for the institution named.

Institution Identity

U.S. Social Security Number (Required)	OR	Taxpayer Identification Number (Required)
_____		_____

Name of Institution _____

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Successor Account Agent

This is the person authorized to act on behalf of the institution.

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

3 Secondary Successor Designation or Information Change

- To designate an individual as your secondary successor or change to your current secondary successor’s information, fill out part A. To designate an institution as your secondary successor or to change the institution’s information, fill out part B.
- The successor/agent must be a U.S. citizen or a resident alien, be age 18 or older, and have a valid U.S. Social Security or Taxpayer Identification Number.

A. Secondary Successor is an Individual

This is a name change due to marriage or divorce. I have attached legal documentation (e.g., marriage license).

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

B. Secondary Successor is an Institution (Trust or Corporation)

- To designate or change the secondary successor as a trust, you must include a copy of the following pages of the trust document: the title page, signature pages, any pages showing the names of the trustees, and any pages showing the name of a successor trustee.
- To designate or change the primary successor as a corporation or other entity, you must include a copy of the appropriate documents from the institution to show who is authorized to enter into agreements for the institution, along with their signatures.
- The trustee or agent for the institution named below certifies that he or she has the authority and capacity to sign and enter into this agreement for the institution named.

Institution Identity

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Name of Institution

Successor Account Agent

This is the person authorized to act on behalf of the institution.

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

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4 Signature Authorization

By signing below,

- I understand that in the event of my death, the primary successor will assume ownership and control of the assets in the account once he or she completes an Account Owner/Agent Change form (form 505). If the primary successor is unable to assume or declines ownership, the secondary successor will assume ownership of the assets in the account once he or she completes an Account Owner/Agent Change form (form 505). If the secondary successor chooses not to accept this role, the beneficiary will become the account owner, and the account will become a custodial account.
- I understand that I am bound by the terms, rights, and responsibilities stated in the Program Description.
- I certify that the information on this form is true and accurate.



Signature of Account Owner/Agent

Date (mm/dd/yyyy)

Name of Account Owner/Agent (please print)

Title (if signed on behalf of a trust, corporation, or other institution)