

# UGMA/UTMA Reregistration for a Former Minor



Use this form to reregister an UGMA/UTMA account as a non-custodial individual account in the former minor's name after they have reached the age at which they may assume control of the account, in accordance with state laws governing custodial accounts.

- This form may be completed by the custodian or the former minor.
- The UGMA/UTMA account will be reregistered as an individual account in the former minor's name.
- If the former minor's legal name has changed, please attach a *Notice of Name Change* form and supporting documentation.
- The former minor will be the only person authorized to act on the individual account.
- When the account is reregistered, most services established by the custodian will end (banking services, online access, and automatic investment/withdrawal plans).

### After the account has been reregistered, the former minor may:

- Authorize another person to help manage the account by completing our *Power of Attorney* form.
- Establish banking services, online access and automatic investment/withdrawal plans. Most services can be added after logging in at americancentury.com. Note: Any bank account used for services must be in the former minor's name.
- Name beneficiaries for the account by submitting a completed *Transfer on Death (TOD) Agreement*.

## 1 Indicate the UGMA/UTMA Account(s) to be Reregistered

**Please provide at least one UGMA/UTMA account number to help us locate the account(s) that need to be reregistered.** You do not need to list every UGMA/UTMA account. We will update all UGMA/UTMA accounts associated with the former minor's Social Security number, even if the account number is not provided.

UGMA/UTMA account number(s)

## 2 Provide Information About the Former Minor

**Please provide all of the requested information. We will use this information to update the account. If the Social Security number is different from our records, additional documentation is required.**

Former minor's name, as it appears on the UGMA/UTMA

Former minor's current legal name, if different from above. Please attach a *Notice of Name Change* form and supporting documents.

Former minor's Social Security number (this is required for tax reporting)

Date of birth (mm-dd-yyyy)

Telephone:  Daytime  Evening  Cell

Telephone:  Daytime  Evening  Cell

Former minor's email address

## Provide Information About the Former Minor (continued)

**Provide the former minor's residential and mailing addresses.** The residential address is required for identity verification purposes, and the mailing address will be used for account statements and other required communications.

Former minor's residential street address (required; **no P.O. Boxes or PMB**)

City

State

ZIP

Check this box if the former minor's mailing address is the same as the above address

Former minor's mailing address (if different from residential address; PMB and PO Boxes are allowed)

City

State

ZIP

### 3 Provide Signature and Date Signed

**By signing this form, I authorize American Century Services, LLC ("American Century") to reregister the UGMA/UTMA as a non-custodial individual account in the former minor's name, thereby transferring control from the custodian to the former minor. The person whose signature appears below certifies that:**

- To the best of my knowledge, the information provided on this form is complete and accurate. I understand that if the information on this form does not match the UGMA/UTMA account records, American Century may require additional documentation.
- The former minor has reached the age at which they are entitled to assume control of their UGMA/UTMA account under applicable state law.
- After reregistration, the former minor may transact business on this account by telephone, online, by fax, in writing, or by any other means acceptable to American Century.
- I understand that providing the former minor's email address gives American Century permission to email information about products and services.
- If the UGMA/UTMA is enrolled in eCommunication and the former minor's email is provided, the enrollment will continue for the individual account. If the custodian's email address is provided, the account will be unenrolled from eCommunication, and the former minor will need to re-enroll. If the account is not enrolled in All Electronic eCommunication, it may be subject to the annual account maintenance fee.
- In consideration of American Century accepting this form, I agree to defend, hold harmless and indemnify American Century and its officers, agents, employees, affiliates and successors from liability for any loss, claim or expense that I may sustain as a result of their acting on transaction instructions they believe to be genuine.
- American Century is not a party to any disputes between the custodian and former minor regarding ownership or control of the account assets.
- **Important Information About New Accounts:** A federal law, established to help stop the funding of terrorism and money laundering activities, requires financial institutions to verify the identity of each person who opens an account. American Century verifies your identity using your name, street address, date of birth and U.S. Social Security number. In some instances, we may request additional documentation.



Signature of custodian or former minor

Date signed

Printed name of signer