

Iowa Advisor 529 Plan Transfer Due to Death

Complete this form to transfer ownership of an existing 529 plan account due to the death of the Account Owner. If you have questions about this form, contact your financial advisor or call **1-800-774-5127**. Information is also available online at **www.iowaadvisor529.com**.



In accordance with Iowa state law, in the event a participant or other account owner dies and has not designated a successor to the account, the following criteria will be used: a.) The designated beneficiary, if 18 years of age or older at the time of the participant's death, shall become the owner of the Iowa Advisor 529 Plan account, as well as remaining the beneficiary or b.) If the designated beneficiary is under the age of 18, account ownership will be transferred to the beneficiary's surviving parent or other legal guardian.

1 EXISTING ACCOUNT OWNER INFORMATION

To help ensure timely and accurate processing of this form, please print clearly.

Name of decedent (first, middle initial, last) _____ Social Security/taxpayer ID number _____

U.S. residential street address _____ City _____ State _____ ZIP code _____

Date of death of decedent _____

2 NEW ACCOUNT OWNER INFORMATION

The successor Account Owner or successor trustee(s) must have their signature(s) Medallion Guaranteed on this completed form. An Account Application, completed by the new Account Owner, is also required unless you are transferring to an existing 529 plan account.

Name of new Account Owner _____ Social Security/taxpayer ID number _____

Account number (if transferring to an existing account) or write "New account" if new. _____

U.S. residential street address _____ City _____ State _____ ZIP code _____

U.S. mailing address (if different than U.S. residential street address) _____ City _____ State _____ ZIP code _____

E-mail address _____ Daytime phone _____ Evening phone _____

Signature of successor Account Owner, Custodian, or Trustee/Executor _____

Print name _____

Date _____



3 MAILING INSTRUCTIONS

REGULAR MAIL

Iowa Advisor 529 Plan
c/o Voya Investment Management
PO Box 9659
Providence, RI 02940-9659

OVERNIGHT/COURIER

Iowa Advisor 529 Plan
c/o Voya Investment Management
4400 Computer Drive
Westborough, MA 01581-1722

Iowa Advisor 529 Plan is a part of the Iowa Educational Savings Plan Trust, a state-sponsored 529 college savings plan administered by the State of Iowa, for which the Treasurer of the State of Iowa serves as the Trustee. Voya Investment Management Co. LLC provides investment management and administrative services for the Iowa Advisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.

