



Select only one registration type. For registrations for trusts or entities, see Section 2. You must submit a separate form for additional registrations.

1 Account registration — For UGMA/UTMA only

A. UGMA/UTMA Account (Select one.)

☐ **New UGMA/UTMA:** Investments in an UGMA/UTMA account constitute an irrevocable gift to the minor. The custodian is responsible for transferring the property to the minor when the minor reaches the specified age.

OR

☐ **Transfer from an UGMA/UTMA Account:** If your current UGMA/UTMA assets are not held with American Funds, determine the amount you wish to transfer from your existing UGMA/UTMA account and send a check for the proceeds to CollegeAmerica. If the UGMA/UTMA assets are held at American Funds, send a written request with a signature of the current custodian to CollegeAmerica. Transfers from an UGMA/UTMA may have tax consequences. If you complete this section, the Account will be registered as a 529 Account funded with UGMA/UTMA assets, which involves additional restrictions. Please refer to the "Rollovers and transfers" section of the Program Description. **Provide the following information:**

Identify state where UGMA/UTMA is established Age of majority to be used \$ _____ Amount

B. Account Owner: Provide information about the minor below. Information about the custodian should be provided in 1-C.

____-____-____
SSN of Account Owner (minor) ____-____-____
Date of birth of minor (mm/dd/yyyy) _____
Country of citizenship

First name of minor MI Last

Residence address (physical address required — no P.O. boxes) City State ZIP

C. Custodian:

____-____-____
SSN of custodian ____-____-____
Date of birth of custodian (mm/dd/yyyy) _____
Country of citizenship

First name of custodian MI Last

Residence address (physical address required — no P.O. boxes) City State ZIP

Mailing address (if different from residence address) City State ZIP

Email address* ()
Daytime phone

*Your privacy is important to us. For information on our privacy policies, visit www.capitalgroup.com.

D. Successor custodian designation: A successor custodian can only be designated if allowed in the state where the UGMA/UTMA is established.

Full name (include middle initial) (print) ____-____-____
Date of birth of successor custodian (mm/dd/yyyy) _____
Relationship to minor

Name of witness (print) **X**
Signature of witness

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

Note: The witness cannot be the person named as the custodian or successor custodian above.



2 Account registration — For entities (including trusts) only

If there are multiple trustees, each will be required to sign the CollegeAmerica Account Application in Section 9.

A. Type of Account (Select one.)

☐ **Trust Account** — You must attach the title page, the signature page and the trustee assignment page.

☐ **Other entity** — Please specify: _____

NOTE: If the Account being established is for a corporation, partnership or other type of organization, include a government-issued document such as certified articles of incorporation or a business license to verify the existence of the entity. A completed *Entity Beneficial Owners* form is also required.

B. Account Owner: Provide information about the trust or entity below. Information about the trustee or authorized person should be provided in 2-C.

TIN of trust or entity

-

Date of trust (if applicable) (mm/dd/yyyy)

Name of trust or entity

Residence address (physical address required — **no P.O. boxes**)

City

State

ZIP

Mailing address (if different from residence address)

City

State

ZIP

C. Trustee of trust or authorized person of the entity:

-

SSN

-

Date of birth (mm/dd/yyyy)

Country of citizenship

First name of trustee, corporate officer or authorized person

MI

Last

Residence address (physical address required — **no P.O. boxes**)

City

State

ZIP

Mailing address (if different from residence address)

City

State

ZIP

Email address*

()

Daytime phone

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SSN Date of birth (mm/dd/yyyy) Country of citizenship

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- If no selection is made, trustees must act jointly.
- Requests that can be made via phone only require one trustee to act.