



The Ohio Education Trust

Beneficiary Form

Use this for to:

- Create a Beneficiary (1)
- Change a Beneficiary (2)

Complete all sections that apply and return to:

The Ohio Education Foundation
6539 Harrison Ave #1175
Cincinnati, Ohio 45247

If sections are not completed, processing will be delayed

There is NO FEE to create a beneficiary. The fee to change a Beneficiary is \$50. *Payment must be sent with form.

Change of Beneficiary fee is waived in the case of Death or disability of the original Beneficiary. If the original Beneficiary has died, or is disabled Please attach documentation.

Print or type all information except your signature. **ORIGINAL (WET) SIGNATURE IS REQUIRED.**

1. Create a Beneficiary

Beneficiary Name:

Social Security Number:

Date of Birth:

Address:

Parent or Guardian:

Phone number:

Does the Parent or Guardian meet the Federal Poverty guidelines? <https://aspe.hhs.gov/poverty-guidelines>

- YES: Attach income verification
- NO: Request a Waiver

DO NOT TYPE SIGNATURE:

Signature:

2. Change a Beneficiary

Beneficiary Name:

Social Security Number:

Date of Birth:

Address:

Relationship to current Beneficiary:

Existing account number:

By signing this form, I understand that I am authorizing The Ohio Education Foundation to Create or Change a Beneficiary of The Ohio Education Trust and establish a 529 Savings account for the Beneficiary.

Date: