



Michigan Education Savings Program

# Michigan Education Savings Program Account Services Form

Use this form to update your Program Account information  
(Individual Account Owners may also use this form  
to add, change or revoke a Contingent Account Owner.)

**Questions?** Call toll-free 1-877-861-MESP (1-877-861-6377),  
Monday through Friday, 8:00 a.m. – 10:00 p.m. ET  
P.O. Box 30361, Lansing, MI 48909-7861  
Visit [www.misaves.com](http://www.misaves.com)

## Instructions

- You can update Account Owner or Beneficiary information by calling the Program or you can mail this form to the Program.
- An Individual Account Owner can add, change or revoke Contingent Account Owner information by mailing this completed form to the Program. Note, a Contingent Account Owner cannot be named for a Uniform Gifts to Minors Act (UGMA) or Uniform Transfers to Minors Act (UTMA), or any entity account.
- If you choose submit your Account changes by mail, then please be sure to complete Section 1, along with all relevant sections of this form. Entity Account Owners should also review the enclosed *List of Approved Documents Required for Substantiation by Entity Account Owners* and submit any required documentation along with this form.
- You must complete a separate *Account Services Form* for each Account and/or Beneficiary. You can obtain additional copies of this form, or any Program form, by visiting [www.misaves.com](http://www.misaves.com) and clicking on *Account Forms* or by calling the Program.
- Print in capital letters with blue or black ink, sign and date the form, then mail it to the Program at the above address.

## 1 Account Information *(You must provide complete information.)*

Fund and Program Account Number <i>(Provide any one from your statement.)</i>												Day Telephone Number											
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*Fund and Program Account Number (Provide any one from your statement.)*

Account Owner or Custodian Name <i>(First, MI, Last, Suffix), or Entity Name</i>																							
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*Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name*

Beneficiary Name <i>(First, MI, Last, Suffix)</i>																							
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*Beneficiary Name (First, MI, Last, Suffix)*

## 2 Update Account Owner and/or Beneficiary Information *(You must provide complete information.)*

You can update Account Owner or Beneficiary information online, by telephone or you can complete and mail this form.

### Account Owner Information

New Residential Address or Entity's Principal Place of Business or Local Office <i>(This must be a street address -- a P.O. Box is not acceptable.)</i>																							
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*New Residential Address or Entity's Principal Place of Business or Local Office (This must be a street address -- a P.O. Box is not acceptable.)*

City, State, Zip																							
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*City, State, Zip*

New Mailing Address, if different from the above address																							
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*New Mailing Address, if different from the above address*

Mailing Address City, State, Zip																							
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*Mailing Address City, State, Zip*

Day Telephone Number												Evening Telephone Number											
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*Day Telephone Number*

E-mail Address <i>(optional)</i>																							
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*E-mail Address (optional)*

### Beneficiary Information

Check this box if the Beneficiary lives with the Account Owner. If so, do not provide an address in the boxes below.

New Residential Street Address <i>(This must be a street address-- a P.O. Box is not acceptable.)</i>																							
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*New Residential Street Address (This must be a street address-- a P.O. Box is not acceptable.)*

City, State, Zip, Country <i>(if foreign address)</i>																							
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*City, State, Zip, Country (if foreign address)*



## List of Approved Documents for Substantiation by Entity Account Owners

Substantiation is required from an entity Account Owner when opening a Program Account or when conducting a transaction for that Account. Such documentation must include the following:

- the legal status of the entity;
- authorization by the entity to open the Account or conduct the transaction; and
- authorization by the entity for the signer of the form to open the Account or conduct the transaction.

The same document may provide substantiation of all of the three required elements.

The documents set forth below have been approved by the Board to meet these substantiation requirements and must be original or certified documents, dated no more than 60 days prior to receipt by the Program.

1. A certified copy of a court order establishing an estate and naming a legal representative of the estate that is authorized to act as a signer of the Account of the estate;
2. A certificate signed by the trustee of a trust, a court order, or a certified copy of the portion(s) of a trust instrument, that confirms the creation of the trust and the identity of the trustee, and provides authorization for the trustee to act as a signer for the Account of the trust;
3. A letter or memorandum from the Internal Revenue Service indicating that the entity is an organization described in Section 501(c)(3) of the Internal Revenue Code;
4. An original memorandum exhibiting the appropriate letterhead and containing the holographic signature of the officer of the organization; or
5. If the entity Account Owner is unable to provide substantiation in any of the foregoing forms, the entity Account Owner may propose an alternate form of substantiation to the Program administrator's designee for consideration. The Program administrator's designee must review the alternate form of substantiation for authenticity and completeness and must accept or reject it.
  - ***If judged authentic and complete***, the Program administrator's designee must act on the alternate form of substantiation within 30 business days of so determining.
  - ***If judged inauthentic or incomplete***, the Program administrator's designee must notify the Account Owner of the rejection of the alternate form of substantiation and set forth the reason for such determination in writing within 30 business days of making such determination.

**Please retain a copy of this notice with your records.**