

Designation of successor custodian For UTMA/UGMA accounts



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Use this form to designate a successor custodian(s) for a Putnam minor account registered under the Uniform Transfers to Minors Act or Uniform Gifts to Minors Act (UTMA/UGMA). This form is not effective until Putnam receives it in good order. Any successor custodian(s) designated on this form will replace any previously designated successor custodian(s) for the account. You may designate a successor custodian only if you are the current custodian of the account.

Section 1 Account information

Name of custodian

First	MI	Last	Social Security number	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Day phone	Evening phone
<input type="text"/>	<input type="text"/>

Please update my day and/or evening phone number

E-mail address

Name of minor

First	MI	Last	Social Security number	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 2 Successor custodian

I hereby designate the following successor custodian in the event of my resignation, disability or death.

Name of successor custodian

First	MI	Last	Social Security number	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of contingent successor custodian

First	MI	Last	Social Security number	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 3 Authorization

I hereby make the successor custodian designation(s) indicated above and revoke any previous designations made by me for the above account(s). I certify that the information contained herein is true and correct.

The custodianship remains subject to UTMA/UGMA provisions of the original donor state in which the transfer/gift was made despite a subsequent change in residence of a transferor, the minor, or the custodian.

YOUR SIGNATURE BELOW MUST BE EITHER NOTARIZED OR VALIDATED WITH A SIGNATURE VALIDATION PROGRAM (SVP) STAMP TO PROVIDE ASSURANCE THAT THE SIGNATURE IS VALID. AN SVP STAMP IS A STAMPED ASSURANCE FOR NON-FINANCIAL TRANSACTIONS BY A FINANCIAL INSTITUTION THAT INDICATES A SIGNATURE IS VALID.

Signature of current custodian

Print name of signature above

Date (mm/dd/yyyy)

PLACE NOTARY PUBLIC OR SVP STAMP BELOW

