

Change of Beneficiary Advocate and Successor Advocate Form

Trust Beneficiary:

I, _____, am the Trust Beneficiary or Current Beneficiary Advocate.
I understand that this change of Beneficiary Advocate is not effective until accepted by the non-profit/
charity and trustee.

- I hereby appoint the person named below as the new Beneficiary Advocate for the above named Trust Beneficiary.

Full Name: _____ SSN: _____ - _____ - _____

Full Address: _____

Relationship to Beneficiary: _____ Email: _____

Phone: _____ Alternate Phone: _____

- I hereby appoint the person named below as the new Successor Beneficiary Advocate for the above named Trust Beneficiary.

Full Name: _____ SSN: _____ - _____ - _____

Full Address: _____

Relationship to Beneficiary: _____ Email: _____

Phone: _____ Alternate Phone: _____

- I wish the Non-Profit/Charity to appoint a Beneficiary Advocate for the above named Trust Beneficiary.

Sign: _____ Date: _____

NON-PROFIT/CHARITY USE ONLY:

The non-profit/charity hereby accepts this change of Beneficiary Advocate.

Sign: _____ Date: _____

Print: _____ Title: _____

Please fax signed form to 1-866-576-0460 and call 1-877-695-6444 if you have any questions