



Trusted Contact Person Designation Form

Return this Form to:

NEST Direct 529
P.O. Box 83529
Lincoln, NE 68501-3529

Overnight Mail:

NEST Direct 529
3606 South 48th Street
Lincoln, NE 68506

If you have questions, please call us at **888.993.3746**, Monday–Friday, 7 a.m. to 7 p.m. (CT).

- Use this form to designate a person (who is at least 18 years old) as your Trusted Contact Person. The NEST Direct College Savings Plan may contact your Trusted Contact Person and use them as a resource if we lose contact with you or believe your Account assets are at risk.
- **Your Trusted Contact Person will not be able to access your Account or transfer assets to or from your Plan Account.**

1. Account Owner Information

Account Owner Name (First, M.I., Last): _____

Account Number(s): _____

Mobile Phone Number: _____

Secondary Phone Number: _____

2. Action for Trusted Contact Person

Add the person identified in Section 3 as Trusted Contact Person

Remove _____ as a Trusted Contact Person

Replace the following Trusted Contact Person with the Trusted Contact Person identified in Section 3:

3. Trusted Contact Person Information

Name of Trusted Contact Person (First, M.I., Last): _____

Mobile Phone Number: _____

Secondary Phone Number: _____

Email Address: _____

Mailing Address: _____

City, State, Zip: _____

Relationship to Account Owner

Advisor Attorney Family Member Friend Spouse Other

4.

Authorization

By signing below, I hereby certify that:

I authorize the NEST Direct College Savings Plan and its service providers to take actions indicated in Section 2 of this form. I further authorize the Plan and its present and future direct and indirect affiliates, successors, assigns, custodians, trustees and any service providers to disclose information to a Trusted Contact Person about my Plan Account(s) in the following circumstances: to address possible financial exploitation; to confirm the specifics of my current contact information, health status, or the identity of any legal guardian, executor, trustee or holder of a power of attorney; or as otherwise permitted by FINRA Rule 2165 (Financial Exploitation of Specified Adults) or other applicable law or regulation. I certify that the Trusted Contact Person is at least eighteen (18) years of age. This form does not create or give your Trusted Contact Person a power of attorney.

Signature and Date Required

X

Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee

Date



UBT
Union Bank & Trust
Program Manager

Nebraska Educational Savings Plan Trust, Issuer. Nebraska State Treasurer, Trustee. Nebraska Investment Council, Investment Oversight. Union Bank and Trust Company, Program Manager.