



Kentucky's Affordable Prepaid Tuition

CHANGE OF PURCHASER DUE TO DEATH, DISABILITY, OR MARITAL DISSOLUTION

CURRENT PURCHASER'S NAME: _____

BENEFICIARY'S NAME: _____

ACCOUNT NUMBER: _____

PLEASE PRINT

NEW PURCHASER'S NAME: _____ SSN#: _____

ADDRESS: _____

HOME PHONE #: _____ WORK PHONE #: _____

REASON FOR CHANGE IN PURCHASER: (circle one) Death of Purchaser Disability of Purchaser Marital Dissolution

If the change in purchaser is due to the death of the purchaser:

- 1) Please provide a copy of the Purchaser's death certificate.
- 2) Contract rights may be transferred from the Purchaser to the Purchaser's Successor-In-Interest, as identified on the Purchaser's KAPT Application or Successor-In-Interest Form. In the absence of the Purchaser's designation of Successor-In-Interest on the KAPT Application or Successor-In-Interest Form, the Purchaser's contract shall be assigned on his death to the Purchaser's surviving spouse.
- 3) As evidence of the Purchaser's surviving spouse, please forward a copy of the Probate Petition relating to the Purchaser's estate or such other documentation identifying the new Purchaser as surviving spouse.

If the change in purchaser is due to the disability of the purchaser:

- 1) Contract rights may be transferred due to the disability of the Purchaser to the named individual or entity as stated on the Purchaser's KAPT Application or Successor-In-Interest Form. In the absence of such written designation, the Purchaser's duly-appointed representative shall become the Purchaser's Successor-In-Interest.
- 2) Please forward copies of Purchaser's Power of Attorney or other legal instrument or court order appointing the Purchaser's Successor-In-Interest. In addition, sufficient evidence must be submitted documenting the determination of Purchaser's disability by court order or such documents signed by Purchaser's physician.

If the change in purchaser is due to marital dissolution in accordance with a court order:

- 1) Contract rights may be transferred upon the marital dissolution of a purchaser and his/her spouse in accordance with a court order assigning the KAPT contract to the purchaser's ex-spouse.
- 2) Please provide a copy of the court order assigning ownership of the KAPT account and the \$20 purchaser change fee.

TO AUTHORIZE THIS PURCHASER CHANGE, THE NEW PURCHASER IS REQUIRED TO SIGN IN THE SPACE BELOW IN THE PRESENCE OF A NOTARY.

By signing below, I am agreeing to all terms and conditions in the KAPT Master Agreement.

NEW PURCHASER'S SIGNATURE

STATE OF _____
COUNTY OF _____

DATE

The foregoing instrument was acknowledged before me this _____ day of _____, 20____.

NOTARY PUBLIC, STATE OF _____

**This change shall become valid upon acceptance by KAPT.
Please send this completed form, required documentation, and fee (if applicable) to the following address:
Kentucky's Affordable Prepaid Tuition, KHEAA, P.O. Box 798, Frankfort, KY 40602-0798**