

UGMA/UTMA Custodian Removal Form



Homestead
Funds

Use this form to remove the custodian from a UGMA/UTMA account held at Homestead Funds once the minor has reached their state's age of trust termination.

Return this form and the *Individual or Joint Account Application* (must be completed by the former minor) to:

Regular Mail

Homestead Funds
c/o of Ultimus Fund Solutions, LLC
P.O. Box 46707
Cincinnati, OH 45246

Overnight Mail

Homestead Funds
c/o of Ultimus Fund Solutions, LLC
225 Pictoria Drive
Suite 450
Cincinnati, OH 45246

If you have a question about this form, call us at **800.258.3030**. For complete information about Homestead Funds and services, see the prospectus, which is available at homesteadadvisers.com or by calling the above toll-free number.

If the former minor's name has changed, the former minor must also complete the *Account Services Form* and submit it together with this form and the *Individual or Joint Account Application*.

1. Account Registration

Tell us how the account is currently registered.

Former Minor's First Name

Middle Initial

Last Name

Social Security Number

Date of Birth (mm/dd/yyyy)

Daytime Telephone Number (in case we have questions)

Custodian's First Name

Middle Initial

Last Name

Social Security Number

Daytime Telephone Number (in case we have questions)

Account Number

Account Number

Account Number

Account Number

Account Number

Account Number

2. Certifications and Signature

By signing below, I (either Former Minor or Custodian) certify under penalties of perjury that:

- The information provided on this form is true, correct, and complete.
- The Former Minor listed in **Section 1** has attained the legal age required by the laws of the state under which the assets were gifted or transferred to him/her.
- No designation was made that requires termination of custodianship for the assets to be delayed until the Former Minor listed in **Section 1** reaches a later age.

Either the custodian or the former minor may sign this form.

You must sign this form in Section 2 continued on the next page.

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2. Certifications and Signature *(continued)*

- d) The Former Minor has not already received equivalent gifts or transfers of money from the custodian that would reduce the value of assets due to the beneficial owner of the account(s).
- e) There are no competing claims from the custodian or a successor custodian that would prevent the Former Minor from receiving assets in the account(s).
- f) If the form is being signed by a Former Minor under the age of 25 the additional certification below applies:

The custodian or successor custodian is unavailable due to death, or is unable to serve, or has declined to release the assets to me as required by applicable state law.

Custodian's Signature

Date (mm/dd/yyyy)

 / /

OR

Former Minor's Signature

Date (mm/dd/yyyy)

 / /