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my529™

Clear form

For my529 Use Only

my529 ID No. _____

Date Received/Initials _____

Date Processed/Initials _____

Form 700
Entity Limited Power of Attorney Registration

ABOUT THIS FORM

- Use this form to register an entity that may be granted limited power of attorney authority with my529 and receive a LPOA Number.
- To register an individual who may be granted limited power of attorney authority, complete an Individual Limited Power of Attorney Registration form (Form 800) instead of this form.
- my529 cannot and does not provide legal, financial, or tax advice. Accordingly, you should consult your legal advisor if you have questions concerning the consequences of submitting this form.

NEXT STEPS

- To register, you must provide the information for a Master Administrator, who will act on behalf of the entity.
- You only need to submit this form once to my529.
- Upon successful processing of this form, my529 will send the Master Administrator a registration confirmation email. The email will provide instructions on how to view the entity's LPOA Number and set up limited power of attorney online access at my529.org for the Master Administrator and additional persons within the entity.
- To provide additional authorized signers from this entity for verification purposes, submit the Entity Limited Power of Attorney Signature Card (Form 730).
- Provide the LPOA Number to each account owner/agent who grants the entity limited power of attorney using the Entity Limited Power of Attorney Authorization form (Form 710). The number is required to complete Form 710.

SUBMITTING THIS FORM

- Please print clearly—preferably in capital letters, using black or blue ink. To ask questions about completing this form, contact my529 toll-free at 888.529.1886 on business days from 7 a.m. to 6 p.m. MT.
- Return this form to: my529, PO Box 145100, Salt Lake City, UT 84114-5100. For delivery by overnight carrier, send to: my529, Board of Regents Building, Gateway 2, 60 South 400 West, Salt Lake City, UT 84101-1284. You may also fax this form to 888.529.9197.

1 Entity Information (Required)

Check the box that applies to the entity that may be granted limited power of attorney authority:

☐ **Financial Advisor Firm** ☐ **Law Firm**
☐ **Accounting Firm** ☐ **Other** If other, please describe: _____

Entity's Name

Entity's Employer Identification Number, U.S. Social Security Number, or Taxpayer Identification Number

Entity's IARD/CRD Number (if applicable)

Entity's SEC Number (if applicable)

2 Entity's Master Administrator Information (Required)

Name of the Entity's Master Administrator (Last, First)

Title

Mailing Address (if a PO Box, a physical address must also be provided)

Physical Address (if different from mailing address)

City State ZIP Code

City State ZIP Code

Phone Number

Fax Number

Email Address

3 Master Administrator's Signature Authorization (Required)

- *By signing below, I certify and agree to register the named entity that may be granted limited power of attorney authority for designated my529 accounts as specified in the Entity Limited Power of Attorney Authorization form(s) (Form 710).*
- *I certify that I have the power and authority to sign this application on behalf of the entity.*
- *I understand that this form does not impose a duty on the named entity to exercise any granted limited power of attorney authority; however, when the entity exercises such authority, the entity will be responsible for any resulting consequences of such actions, must use due care to act for the account owner/agent's benefit in accordance with the limited power of attorney authorization, and will be responsible for maintaining records relating to such actions.*
- *I understand that the signature provided below will be used to validate certain transactions.*
- *I agree to notify my529 within 30 days in the event of a name change, sale, or merger of the named entity.*

Required

Remember to sign here after printing

Signature of the Entity's Master Administrator

Name of the Entity's Master Administrator (please print)

Date (mm/dd/yyyy)