

Change of Beneficiary Form



Instructions

Please use this form to change the Beneficiary on your Texas Tuition Promise FundSM account.

The new Designated Beneficiary must be a “member of the family” of the former Designated Beneficiary as defined by federal law and described in the Plan Description. If the Texas Match the Promise FoundationSM has awarded your beneficiary a matching scholarship or tuition award, changing the beneficiary will forfeit that award.

For UGMA/UTMA, the beneficiary may not be changed.

A change in beneficiary might result in a gift tax or generation skipping transfer tax. See Plan Description and consult your tax advisor.

Forms are available on our website at www.texastuitionpromisefund.com, or by calling a Customer Service Representative at 1.800.445.GRAD (4723), option #5, Monday through Friday from 8am to 6pm Central Time.

Return this form and any other required documents to:
Texas Tuition Promise Fund
P.O. Box 44305
Jacksonville, FL 32231-4305
Fax: 1.800.519.4652

Section I. | Current Purchaser

Please enter the current Purchaser information below:

_____	() _____
Texas Tuition Promise Fund Account Number	Daytime Phone Number
_____	_____
Name of Purchaser (first, middle, last, including suffix)	Social Security or Taxpayer ID Number
_____	_____
Name of Current Beneficiary (first, middle, last, including suffix)	Social Security Number

Section II. | New Designated Beneficiary Information

There are restrictions regarding the change of Beneficiary. Please refer to the Plan Description and Master Agreement on our website for details at www.texastuitionpromisefund.com/content/tips-tools/forms-materials.

_____	_____	
Name of New Beneficiary (first, middle, last, including suffix)	Social Security Number	
_____	_____	
Date of Birth (mm/dd/yyyy)		
_____	() _____	
Street Address (no P.O. Boxes)	Daytime Phone Number	

City	State	Zip

Relationship to Original (Current) Beneficiary		
_____	_____	
Current Age/Grade in School	Projected High School Graduation Year	
<input type="radio"/> U.S. Citizen/Resident Alien (Nonresident aliens are not eligible to participate in the Program.)		

Section III. | Account Agreement and Signature

I certify that the information I have provided, with respect to my Texas Tuition Promise Fund account is true, complete, and accurate. I have received, read, and agree to the terms set forth in the Plan Description and Master Agreement.

I understand that if I am changing the Beneficiary in Section 2, I certify that it is my intent to revoke the original (current) Beneficiary and name a new Beneficiary. I have read the Plan Description and Master Agreement, and I certify that the new Designated Beneficiary is a "member of the family" of the current Beneficiary as defined by federal law and described in the Plan Description and Master Agreement. I acknowledge that changing the Beneficiary of this account will forfeit any scholarships or matching tuition awards from the Texas Match the Promise Foundation™ linked to this account.

Signature of Purchaser

Date

The Texas Tuition Promise FundSM is established and maintained by the Texas Prepaid Higher Education Tuition Board. NorthStar Financial Services Group, LLC ("NorthStar") is the plan manager and the Texas Tuition Promise Fund is distributed by NorthStar affiliate Northern Lights Distributors, LLC and administered by NorthStar affiliate Gemini Fund Services, LLC. Some states offer favorable tax treatment to their residents only if they invest in the state's own plan. Non-residents of Texas should consider whether their state offers its residents a 529 plan with alternative tax advantages and should consult their tax advisor. The Contracts are not deposits or other obligations of any depository institution. Neither a Contract nor any return paid with a refund is insured or guaranteed by the FDIC, the state of Texas, the Texas Prepaid Higher Education Tuition Board, any other state or federal governmental agency or NorthStar or its subsidiaries or affiliates. The Contracts have not been registered with the U.S. Securities and Exchange Commission or with any state.

Purchasers should carefully consider the risks, administrative fees, service and other charges and expenses associated with the Contracts, including plan termination and decreased refund or transfer value. The Plan Description and Master Agreement contain this and other information about the Plan, and may be obtained by visiting www.texastuitionpromisefund.com or calling 1.800.445.GRAD (4723), option #5. Purchasers should read these documents carefully before purchasing a Contract.

Comments or complaints may be forwarded to the Prepaid Higher Education Tuition Program, Office of the Comptroller of Public Accounts at P.O. Box 13407, Austin, Texas 78711-3407, or by calling 1-512-936-2064.

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17605 Wright Street, Omaha, NE 68130

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