

# Account Maintenance Form



## Instructions

Please use this Form to make any of the following changes:

- Add, Change or Remove Successor Purchaser
- Add or Change Social Security or Taxpayer ID Number
- Add or Change Name – Updating name due to qualifying event, i.e., marriage, divorce, etc. (attach appropriate documentation).
- Notification of Early College Enrollment

All changes require a signature in Section V.

Please read the applicable instructions for each section.

Forms can be downloaded from our website at

[texastuitionpromisefund.com/tips-tools/forms-materials/](https://www.texastuitionpromisefund.com/tips-tools/forms-materials/) or requested by contacting a Customer Service Representative at **800-445-GRAD (4723), option 5**, Monday through Friday, 8am to 6pm Central Time.

**Return this form and any other required documents by:**

Uploading to: [access.texastuitionpromise.com/login](https://access.texastuitionpromise.com/login)

Or Mailing to: **Texas Tuition Promise Fund**

**P.O. Box 44305**

**Jacksonville, FL 32231-4305**

## Section I. | Account Information

\_\_\_\_\_  
Texas Tuition Promise Fund (TTPF) Account Number

\_\_\_\_\_  
Name of Purchaser (First, middle, last, including suffix)

\_\_\_\_\_  
Last 4 of SSN or Taxpayer ID Number

( )

( )

\_\_\_\_\_  
Primary Telephone Number

\_\_\_\_\_  
Secondary Telephone Number

\_\_\_\_\_  
Name of Beneficiary (First, middle, last, including suffix)

\_\_\_\_\_  
Last 4 of SSN or Taxpayer ID Number

## Section II. | Successor Purchaser

Complete this section to designate a new Successor Purchaser, to change the existing Successor Purchaser or to remove the existing Successor Purchaser on your account.

**You cannot designate a Successor Purchaser for an UGMA/UTMA account.**

You may name a Successor Purchaser for the contract. In the event of your death, ownership of all assets in the account will be transferred to the Successor Purchaser. The Successor Purchaser will assume all rights that the previous Purchaser had. During the life of the Purchaser, the Successor Purchaser may receive contract information, but cannot make any changes to the contract. Enforceability of a Successor Purchaser designation may vary by state. Check with your estate planning attorney.

- Add a Successor Purchaser for the first time.
- Change an existing Successor Purchaser.
- Remove a Successor Purchaser designation.
- If adding or changing a Successor Purchaser, I certify that the Successor Purchaser is a U.S. Citizen or Permanent Resident Alien. (Nonresident aliens are not eligible to participate in the program.)**

\_\_\_\_\_  
Successor Purchaser Name (First, middle, last including suffix)

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Social Security or Tax ID Number

( )

( )

\_\_\_\_\_  
Primary Telephone Number

\_\_\_\_\_  
Secondary Telephone Number

### Section III. | Update Name, SSN or TIN for Purchaser/Beneficiary/Successor Purchaser

Complete this section to change the name, Social Security Number or Taxpayer ID Number of the **current** Purchaser, Beneficiary or Successor Purchaser.

**To update an SSN, you must include a copy of the Social Security card with this form.**

**To change a name due to a qualifying event like marriage or divorce, you must include a copy of appropriate documentation with this form.**

Please indicate below any updates to the name, Social Security Number or Taxpayer ID Number of the current Purchaser, Beneficiary or Successor Purchaser.

- Purchaser \_\_\_\_\_  
Name \_\_\_\_\_ Social Security or Taxpayer ID Number \_\_\_\_\_
- Beneficiary \_\_\_\_\_  
Name \_\_\_\_\_ Social Security or Taxpayer ID Number \_\_\_\_\_
- Successor Purchaser \_\_\_\_\_  
Name \_\_\_\_\_ Social Security or Taxpayer ID Number \_\_\_\_\_

### Section IV. | Notification of Early College Enrollment

**\*Please Note:**  
By requesting an early Payout Date, the contract will expire on the 10th anniversary of the New Payout Date indicated.

- The beneficiary is taking dual enrollment classes while still in high school. I am requesting a change to the Payout Date so that my beneficiary may begin using the contract earlier than originally projected. I understand this change will accelerate the expiration date of the contract.
- The beneficiary has graduated from high school prior to the projected high school graduation date for the account. I am requesting a change to the Payout Date so that my beneficiary may begin using the account earlier than originally projected. I understand this change will accelerate the expiration date of the contract.

New Payout Date: \_\_\_\_\_

### Section V. | Account Agreement

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

**I understand that if I am naming or changing the Successor Purchaser in Section II, I certify that it is my intent to name a new Successor Purchaser and, if applicable, revoke the previous Successor Purchaser. I agree to notify my Successor Purchaser of his/her status, and that he/she will need to provide a certified copy of a death certificate or other legally acceptable proof of death identifying me by name upon my death.**

x

\_\_\_\_\_  
Purchaser Signature

\_\_\_\_\_  
Date

The Texas Tuition Promise Fund® (“Plan”) is administered by the [Texas Prepaid Higher Education Tuition Board \(“Board”\)](#). Orion Advisor Solutions, Inc. is the manager of the Plan, which is maintained by Catalis Regulatory and Compliance, LLC, who is not affiliated with Orion. The Plan and the Board do not provide legal, financial, or tax advice and you should consult a legal, financial, or tax advisor before participating.

Non-residents of Texas should consider whether their home state, or the beneficiary’s home state, offers its residents any tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for participants in that state’s plan.

Participation in the Plan does not guarantee admission to or graduation from any college or university. Only the purchaser may direct redemptions, withdrawals, changes in beneficiary, or other contract changes.

You may lose money by participating in the Plan. No part of a contract is a deposit or obligation of, or is guaranteed or insured by, the Board, the state of Texas, or any agency or agent thereof. The contracts have not been registered with or approved by the SEC or any state. Purchasers should carefully consider the risks, fees, charges, and expenses associated with contracts, including Plan termination and reduced Transfer or Refund Value. Transfer Value applies to redemptions at Texas private colleges and universities, out-of-state colleges and universities, medical and dental schools, career schools, and registered apprenticeship programs and is the lesser of: (1) the costs the units would cover at a Texas public college or university; or (2) the original purchase price of the units plus or minus the Plan’s net investment earnings or losses on that amount. The [Plan Description and Master Agreement](#) contain this and other information about the Plan and may be obtained by visiting [TexasTuitionPromiseFund.com](#) or calling 800-445-GRAD (4723), option 5. Purchasers should read the Plan Description and Master Agreement, and all other Plan documents carefully before purchasing a contract.

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