

Approval Request to Use Scholarship Tuition Units

For Recipients of Texas Match the Promise FoundationSM Scholarships and Grants

Instructions

If the Texas Match the Promise FoundationSM awarded the Beneficiary of your Texas Tuition Promise Fund[®] (TTPF) contract a matching scholarship or tuition grant, you can use this form to request approval to use those Scholarship Tuition Units. Scholarship Tuition Units can be applied toward the cost of undergraduate resident tuition and required, schoolwide fees at Texas public colleges and universities ONLY. Scholarship Tuition Units cannot be used at medical and dental institutions, private and out-of-state colleges and universities, career schools or registered apprenticeship programs.

Please note: To the extent possible, available Tuition Units that the Foundation matched in the TTPF contract linked to the Beneficiary's scholarship or grant should be used before Scholarship Tuition Units. The Beneficiary's parent or legal guardian who applied for the scholarship may contact the Foundation at match.the.promise@cpa.texas.gov if they have questions or need additional information on use of Scholarship Tuition Units.

- This form is required every semester even if the Beneficiary attends the same Texas public college or university each semester.
- Before you submit this form, make sure your Beneficiary is registered at the chosen school for the chosen term and year.
- Before you submit this form, redeem Tuition Units you will be using in the TTPF contract linked to the Beneficiary's scholarship or grant.

Please allow 14 days to process this form.

Complete and return this form to:
Texas Match the Promise Foundation
P.O. Box 13232
Austin, Texas 78711-3232

Or send via email or fax to:
match.the.promise@cpa.texas.gov
512-463-4208 (fax)

1 | Purchaser Information

Please enter the Purchaser information below.

Texas Tuition Promise Fund (TTPF) account number linked to the Beneficiary's scholarship or grant

Purchaser's Last name (including suffix)

First name

M.I.

Street address

City

State

Zip

()

()

Home telephone number

Daytime telephone number

Email address

2 | Beneficiary Information

Please complete the following information about the Beneficiary.

Beneficiary's Last name (including suffix)	First name	M.I.
Street address		
City	State	Zip
()		
Telephone number	Email address	

3 | Authorize Redemption of Scholarship Tuition Units

Please complete the following information about the Texas public college or university the Beneficiary will be attending.

School name		
School campus/location		
School address (number and street)		
City	State	Zip

Provide your Beneficiary's student identification number provided by the above school: _____

- A student identification number is assigned to a student upon first entering or registering with an educational institution and is used to identify the student in lieu of a name or Social Security number for grades, essays, projects, exams and official documents.
- To be sure that payment is applied correctly, we require the student identification number before we pay benefits to a Texas public college or university. If you do not have the number, please contact the school for the student identification number.

Choose the term and year for which you are authorizing benefit payment:

Term (select one) ☐ Fall
☐ Spring
☐ Summer

Year _____

(For instance, you may have selected Fall 202X above.)

Optional: This form authorizes the use of available Scholarship Tuition Units as needed for the term and year specified above. If you do not limit the number of Scholarship Tuition Units to be redeemed, the Foundation will authorize redemption of all available Scholarship Tuition Units up to the number needed. Or you can limit the number of Scholarship Tuition Units to be redeemed by completing the following:

☐ I want to cap the number of Scholarship Tuition Units to be redeemed at _____ (enter number).

4 | Refund Certification

If the Foundation awarded your Beneficiary a Match the Promise scholarship or grant, a refund (nonqualified withdrawal) from the Texas Tuition Promise Fund (TTPF) contract linked to the scholarship award could reduce or forfeit that award.

Have you requested a refund from the TTPF contract linked to the scholarship or grant since the time of award?

- ☐ Yes
☐ No

5 | Signature

I confirm that I am the Purchaser of the Texas Tuition Promise Fund (TTPF) contract linked to the Beneficiary's Match the Promise scholarship or grant, and certify that the information I have provided with respect to my TTPF contract is true, complete and accurate.

I understand that TTPF will redeem Scholarship Tuition Units awarded to the Beneficiary for undergraduate resident tuition and required, schoolwide fees at a Texas public college or university, excluding medical and dental institutions, up to the amount of available Scholarship Tuition Units or fewer if I capped the number to be redeemed in Section 3 on the previous page. Further, I understand that any additional amounts due to the school for tuition and fees not paid by the Scholarship Tuition Units are the full responsibility of either the Purchaser or the Beneficiary and must be paid by the school's deadline or the Beneficiary's classes may be cancelled or other penalties may be imposed by the school.

Signature of Purchaser

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. Texas Match the Promise Foundation™ scholarships can only be used at Texas public colleges and universities, and any Transfer Value of a Match the Promise Foundation scholarship account cannot be utilized. 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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