Change of Beneficiary Form

TEXAS TUITION PROMISE FUND®
A Prepaid Plan as Smart as You Are

Instructions

Please use this Form to change the Beneficiary on your Texas Tuition Promise Fund® account.

The new Beneficiary must be a "member of the family" of the former Beneficiary as defined by federal law and described in the Plan Description. If the Texas Match the Promise Foundation℠ has awarded your Beneficiary amatching scholarship or tuition award, changing the Beneficiary will forfeit that award.

For UGMA/UTMA accounts, the Beneficiary may not be changed.

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

Forms are available on our website at **TexasTuitionPromiseFund.com/tips-tools/forms-materials/**, or by calling a Customer Service Representative at **800-445-GRAD (4723), option #5,** Monday through Friday from 8am to 6pm Central Time.

Return this Form and any other required documents by:

Uploading to: **access.texastuitionpromise.com/login**

Or Mailing to: **Texas Tuition Promise Fund**
P.O. Box 44305
Jacksonville, FL 32231-4305

Section I. | Account Information

Please enter the current Purchaser information below:

Texas Tuition Promise Fund Account Number

( ) Primary Phone Number

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

Last 4 of SSN or Taxpayer ID Number

Name of Current Beneficiary (First, middle, last, including suffix)

Last 4 of SSN or Taxpayer ID Number

Section II. | New Designated Beneficiary Information

There are restrictions regarding a change of Beneficiary. Please refer to the Plan Description and Master Agreement on our website for details at TexasTuitionPromiseFund.com/content/tips-tools/forms-materials. The Beneficiary cannot be changed if the account has reached the 10-Year Termination deadline.

If the Beneficiary is changed, the Prepaid Contract will expire on the 10th anniversary of the date the new Beneficiary is projected to graduate from high school.

Name of New Beneficiary (First, middle, last, including suffix)

Social Security or Taxpayer ID Number

Date of Birth (mm/dd/yyyy)

Street Address (number and street, including apartment number, no P.O. Boxes)

( ) Primary Phone Number

City

State

Zip

Relationship to Current Beneficiary

Current Age/Grade in School

Projected High School Graduation Year

○ U.S. Citizen or Permanent Resident Alien (Nonresident aliens are not eligible to participate in the Fund.)

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 read and agree to the terms set forth in the Plan Description and Master Agreement.

If I am changing the Beneficiary in Section II, I certify that it is my intent to revoke the current Beneficiary and name a new Beneficiary. I have read the Plan Description and Master Agreement, and I certify that the new 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.

X

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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