

Change of Purchaser Form



Instructions

Please use this form to update or change the current purchaser on your Texas Tuition Promise Fund® account. **Both Signature sections must be completed for a change of purchaser to take effect.**

Forms are available on our website at www.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. | Type of Change

- Transfer Account to New Purchaser**
You must fill out Sections II, III and IV.
- Transfer Account to New Purchaser Due to Current Purchaser's Death**
You must fill out Sections II, III and IV.

The following supporting documentation is required for a change of purchaser due to death only:

- If you are the current successor purchaser named on the account, a copy of the death certificate is required.
- If no successor purchaser is named on the account, a copy of the death certificate and the appropriate court documents giving evidence of Executorship of the purchaser's estate is required.

Section II. | Current Purchaser Information

Please enter the current purchaser information below:

Texas Tuition Promise Fund Account Number

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

Last 4 of SSN or Taxpayer ID Number

Primary Telephone Number

Secondary Telephone Number

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

Last 4 of SSN or Taxpayer ID Number

Section III. | Signature for Current Purchaser or Executor

If you do not know the current account value of your TTPF account, you can find it on the customer portal at access.texastuitionpromise.com under the Benefits tab by selecting the FAESA option, or by calling Customer Service at 800-445-GRAD (4723), option 5.

If your account value is equal to or greater than \$100,000, a Signature Guarantee is required.

If your account value is less than \$100,000, a Notary Stamp is required.

Section A. (COMPLETE SECTION A IF ACCOUNT VALUE IS \$100,000 OR MORE)

For Current Purchaser or Executor:

A signature guarantee is a warranty by a participant in a Medallion Signature Guarantee Program that the signature is genuine and that the person signing is competent and authorized to sign. Many domestic banks or trust companies, credit unions, brokers, dealers, national securities exchanges, registered securities associations, clearing agencies and savings associations participate in such programs.

If you are the current purchaser, your signature(s) must correspond in every particular, without alteration, with your name(s) as printed on the current account registration.

I certify that the information I have provided is true, complete, and accurate. I have read and agree to the terms set forth in the Plan Description and Master Agreement. I certify that by executing this form, I relinquish all rights and responsibilities of the contract to the new purchaser.

X _____ Date _____
Signature of Current Purchaser, or

X _____ Date _____
Signature of Executor (in cases of death only)

Signature Guarantee:

Acknowledgment of signature by a notary public is NOT acceptable if your account value is \$100,000 or more. A signature guarantee ink stamp must be affixed below with appropriate signature, title and date.

Affix medallion stamp here for account value of \$100,000 or more:

Guarantor's First Name, Middle Initial, Last Name Title

Name of the Guarantor Institution

X _____ Date _____
Signature Guarantor

The guarantor must appear with the printed name, title and signature of an officer and the name of the guarantor institution. A NOTARY PUBLIC STAMP OR SEAL IS NOT ACCEPTABLE FOR ACCOUNTS OF \$100,000 OR MORE.

Section III. | Signature for Current Purchaser or Executor (continued)

Section B. (COMPLETE SECTION B IF ACCOUNT VALUE IS LESS THAN \$100,000)

For Current Purchaser or Executor:

If you are the current purchaser, your signature(s) must correspond in every particular, without alteration, with your name(s) as printed on the current account registration.

I certify that the information I have provided is true, complete, and accurate. I have read and agree to the terms set forth in the Plan Description and Master Agreement. I certify that by executing this form, I relinquish all rights and responsibilities of the contract to the new purchaser.

X

Signature of Current Purchaser, or

Date

X

Signature of Executor (in cases of death only)

Date

Notary Public Details:

Affix notary public seal here for account value of less than \$100,000:

Notary Public's First Name, Middle Initial, Last Name

X

Notary Public Signature

Date

Section IV. | New Purchaser Information and Certification

Please enter the information of the new purchaser below:

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

Full SSN or Taxpayer ID Number

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

Primary Telephone Number

City

State

Zip

Secondary Telephone Number

Email Address

If the purchaser is an organization, please indicate type:

- Corporation, Partnership, or LLC (enclose copy of certificate of formation)
- Estate (enclose copy of court order or other document showing ownership of contract)
- Trust (enclose copy of trust instrument)
- 501(c)(3) (enclose copy of ruling determination letter from IRS)
- Other

Section IV. | New Purchaser Information and Certification (continued)

The new purchaser will be required to register and link their account on the customer portal at access.texas.tuitionpromise.com under "Have an account but not online access?" before they can transact on it.

For New Purchaser:

I certify that the information I have provided is true, complete, and accurate. I have read and agree to the terms set forth in the Plan Description and Master Agreement.

X _____
Signature of New Purchaser Date

Notary Public Details:

Affix notary public seal here:

Notary Public's First Name, Middle Initial, Last Name

X _____
Notary Public 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. [Texas Match the Promise Foundation](#)SM 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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