

Change of Purchaser Form



Instructions

Please use this Form to update or change the current Purchaser on your Texas Tuition Promise Fund® account. **The Signature Guarantee Section 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 (Signature Guarantee Required)**
You must fill out Sections II, III and IV.
- Transfer Account from Current Purchaser Due to Current Purchaser's Death (Signature Guarantee Required)** You must fill out Sections II, III and IV.

The following supporting documentation is required for 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

Please enter the Current Purchaser information below:

Texas Tuition Promise Fund Account Number

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

()

Primary Telephone Number

Last 4 of SSN or Taxpayer ID Number

()

Secondary Telephone Number

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

Last 4 of SSN or Taxpayer ID Number

Section III. | New Purchaser Information and Certification

Please enter the information of the New Purchaser below:

_____ Name of New Purchaser (First, middle, last including suffix)			_____ Full Social Security Number 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

The new Purchaser will be required to register and link their account before they can transact on it.

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

Section IV. | Current Purchaser Account Agreement and Signature Guarantee

For Current 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. 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

A Signature Guarantee is required when an account is transferred to a New Purchaser.

Signature Guarantee—A Signature Guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, savings associations, credit unions and brokerage firms. The words "SIGNATURE GUARANTEED" must be stamped or typed near the signature being guaranteed. The printed name, title, and signature of an officer and the name of the guarantor institution must be noted below. A NOTARY PUBLIC STAMP OR SEAL IS NOT ACCEPTABLE.

Affix medallion stamp here:

Guarantor's First Name, Middle Initial, Last Name (if required) Title

Eligible Guarantor Institution (if applicable)

X
Signature of Guarantor Date

The Texas Tuition Promise Fund® ("Fund") is administered by the Texas Prepaid Higher Education Tuition Board ("Board"). Orion Advisor Solutions, Inc. is the plan manager of the Fund. The Fund 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 Fund 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 Fund. 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 Fund 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 net investment earnings or losses on that amount. The Plan Description and Master Agreement contain this and other information about the Fund and may be obtained by visiting www.TexasTuitionPromiseFund.com or calling 800-445-GRAD (4723), option #5. Purchasers should read the Plan Description and Master Agreement, and all other Fund documents carefully before purchasing a contract.

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