

# PRIVACY & SECURITY POLICY



As a purchaser of a contract to buy tuition units in the Texas Tuition Promise Fund® (the “plan”), you are entitled to know how the plan and Orion Advisor Solutions, Inc., the current plan manager, and its subcontractor Catalis Regulatory & Compliance LLC (collectively with their affiliates, subcontractors, employees, and agents, “we”), protect your personal information and how we limit its disclosure.

This notice was last updated in June 2024. If we materially update or change this notice, we will post an update on the plan website at [www.TexasTuitionPromiseFund.com](http://www.TexasTuitionPromiseFund.com). If you do not have access to a computer and would like a hard copy of the information sent to you, please call the plan manager at 800-445-GRAD (4723), option #5.

## COLLECTION OF INFORMATION

We obtain non-public, personal information about participants and beneficiaries from the following sources

- your application and other forms,
- your account information and profile on the plan website, and
- your transactions related to the plan.

We only collect personal information on the application, through the plan website, or provided at our request if you willingly provide it, either directly by mail, fax, email, or on the secure areas of the plan website. When you log on to the website to access your account, we use your personal credentials to identify you, to provide you with requested products and services, and for everyday business purposes. To update your personal information online, log into your account on the website, select the “Profile” tab, and then select the “Personal Information” tab.

We use “cookies,” together with pixels, tags, and other analytics, to help us monitor, manage, and improve the plan website. When you visit the plan website, we collect information including, but not limited to, your domain name, internet protocol (IP) address, internet site that linked you to our website, if any, and browser information. For example, cookies and analytics tools help us recognize new versus repeat visitors, track the pages visited, and enable some special features. You can refuse cookies by turning them off in your browser settings; however, doing so may limit your access to certain sections of the website.

## USE OF INFORMATION

We may use your personal information for everyday business purposes, such as to process your transactions, maintain your account, respond to your inquiries, provide you services, and respond to court orders and legal investigations.

## RIGHT OF REFUSAL

We will not disclose your personal information to unaffiliated third parties, except as required or permitted by law, unless you expressly consent to such disclosure.

## PROTECTION OF INFORMATION

We do not disclose non-public, personal information about current or former account owners/beneficiaries to anyone, except as required or permitted by law.

## **SECURITY MEASURES**

We maintain physical, electronic, and procedural safeguards designed to protect your personal account information. All transactions on the plan website are secured by Secure Sockets Layer (“SSL”) protocol and 256-bit encryption. SSL is used to establish a secure connection between your personal computer and the plan server, while encryption transmits information in a scrambled format.

For your security, we will not include personal or contact information in non-secure emails. To protect your own privacy, we advise you not to communicate confidential and/or personal information, such as Social Security and account numbers, to us via non-secure emails.

We do not guarantee or warrant that any part of the plan website, including any file available for download, is free of viruses or other harmful code. It is your responsibility to take appropriate precautions, such as using antivirus software, to protect your computer.

TO KEEP YOUR ACCOUNT INFORMATION PRIVATE AND PREVENT UNAUTHORIZED TRANSACTIONS, DO NOT ALLOW ANYONE ELSE TO USE YOUR ACCOUNT PASSWORD, AND TAKE SPECIAL PRECAUTIONS WHEN ACCESSING YOUR ACCOUNT ON A COMPUTER USED BY OTHERS OR THE PUBLIC.

## **CONTACT US**

To submit any questions about this Privacy Policy, write to Orion at 17605 Wright Street, Omaha, Nebraska 68130; email Orion by clicking on the “Contact Us” section of the plan website at [www.TexasTuitionPromiseFund.com](http://www.TexasTuitionPromiseFund.com); or call us at 800-445-GRAD (4723), option #5.

## **STATE OF TEXAS PRIVACY NOTICES**

Federal Privacy Act Notice. Disclosure of your Social Security number on the application is required and authorized under applicable law for the purpose of tax administration and identification. 42 United States Code §405(c)(2)(C)(i); Internal Revenue Code §§529(d) and 6109(a); and Texas Education Code §54.772.

Texas Comptroller of Public Accounts Privacy Notice. The Comptroller’s privacy notice is available at <https://comptroller.texas.gov/about/policies/privacy.php>. Under Chapter 559, Texas Government Code, you are entitled to review, request, and correct information we have on file about you, with limited exceptions. To request information for review or to request an error correction, contact Orion at 17605 Wright Street, Omaha, Nebraska 68130, or by phone at 844-445-GRAD (4723), option #5. You may also request information from the Comptroller online at the link above, by email ([open.records@cpa.texas.gov](mailto:open.records@cpa.texas.gov)), by mail at Open Records Section, Comptroller of Public Accounts, P.O. Box 13528, Austin, TX 78711-3528, or by fax at 512-475-1610.

## **COMMENTS OR COMPLAINTS**

You may submit comments or complaints by mail to the Prepaid Higher Education Tuition Program, Office of the Comptroller of Public Accounts, P.O. Box 13407, Austin, Texas 78711-3407, or by calling 512-936-2064.