

Benefits Authorization Form



For Texas Public Colleges and Universities

Instructions

Please use this form to authorize the redemption of your Texas Tuition Promise Fund (TTPF) tuition units for undergraduate resident tuition and required, schoolwide fees at Texas public colleges and universities (benefits). (Please use the Transfer Value Payment Authorization Form for benefit payments to Texas private colleges and universities, out-of-state colleges and universities, career schools, medical and dental schools, and apprenticeship programs.)

- We require the purchaser's authorization before we pay benefits to a Texas public college or university. Benefits can be redeemed via this form or online at [TexasTuitionPromiseFund.com](https://www.texas tuition promise fund.com) by logging into your account and selecting Benefits, then Benefits Information, then Authorize My Benefits.
- This form is required *every semester even if the beneficiary attends the same 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.
- Visit [TexasTuitionPromiseFund.com](https://www.texas tuition promise fund.com) to:
 - view/download the Student Handbook for details on using TTPF benefits;
 - view FAQs on how to use TTPF benefits; and
 - view the most recent tuition unit redemption values included at the back of the Academic Year Tuition Unit Pricing Schedule and Unit Value Redemption Guide located under Documents on the website.

Forms are available on our website or by contacting 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.texas tuition promise fund.com/login

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

SECTION I. | Purchaser Information

Please enter the purchaser information below:

Texas Tuition Promise Fund (TTPF) Account Number

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

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

City

State

Zip

()

Primary Telephone Number

()

Secondary Telephone Number

Email Address

SECTION II. | Beneficiary Information

The beneficiary is the person designated on the account for which you are authorizing use of tuition units to pay tuition and required, schoolwide fees at the chosen Texas public college or university for the chosen term and year.

Please complete the following information about the beneficiary:

Name of Beneficiary (first, middle, last, including suffix)

Street Address (number and street, including apartment number)

City

State

Zip

()

()

Primary Telephone Number

Secondary Telephone Number

Email Address

SECTION III. | Authorize Redemption of Tuition Units and Payment to Texas Public College or University

Please complete the following information about the Texas public college or university to be paid:

School Name

School Campus/Location (example: University of Texas—Dallas)

School Address (number and street)

City

State

Zip

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

Term (select one): Fall

Spring

Summer

Year: _____ (202X)

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

Student Identification Number

- 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.
- 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 beneficiary's school for the student identification number.

Optional: You can limit the number of mature tuition units to be redeemed for the term and year specified above by completing the following (tuition units are mature when they meet the three-year holding period):

I want to cap the number of tuition units to be redeemed at _____ (enter number).

If you do not limit the number of tuition units to be redeemed, the system will default to using however many mature tuition units are available on the account, up to the number needed to pay the tuition and required, schoolwide fees billed by the school.

SECTION IV. | Purchasers with Multiple Contracts for the SAME Beneficiary

Important:

If you have multiple accounts (contracts) for the SAME beneficiary that have mature tuition units available for redemption, please choose one of the following:

- Yes, apply this authorization to all of my accounts with available (mature) tuition units for this beneficiary. The system will use however many mature tuition units are available on the accounts, up to the number needed to pay the tuition and required, schoolwide fees billed by the school.
- No, apply this authorization only to the account indicated above.

SECTION V. | Signature

I confirm that I am the purchaser of the account indicated above and certify that the information I have provided with respect to my Texas Tuition Promise Fund (TTPF) account is true, complete and accurate. I acknowledge that I have read, understand and agree to the terms in the Plan Description and Master Agreement.

I understand that TTPF pays only undergraduate resident tuition and required, schoolwide fees up to the amount of available mature tuition units or fewer if specified above. Further, I understand that any additional amounts due to the school for tuition and fees not paid by TTPF are the full responsibility of either the purchaser or the beneficiary and must be paid by the deadline set by the school or the beneficiary's classes may be cancelled or other penalties may be imposed by the school. I further understand that any refunds related to dropped classes after the school has billed TTPF are between the beneficiary and the school and that no tuition units will be restored to my account(s) after TTPF has paid the school.

X

Signature of Purchaser (required)

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. The Plan Description and Master Agreement contain this and other information about the Plan and may be obtained by visiting [TexasTuitionPromiseFund.com](https://www.texas-tuition-promise-fund.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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