

Approval Request to Use Scholarship Tuition Units



For Recipients of Texas Match the Promise FoundationSM Scholarships and Grants

Instructions

If the Texas Match the Promise FoundationSM awarded the Beneficiary of your Texas Tuition Promise Fund[®] (TTPF) account a matching scholarship or tuition grant in grades five through nine, you can use this form to request approval to use those Scholarship Tuition Units. Scholarship Tuition Units can be applied toward the cost of undergraduate tuition and school-wide required fees at Texas public colleges and universities ONLY. Scholarship Tuition Units cannot be used at career schools or private or out-of-state colleges and universities.

Please note that, to the extent possible, available Tuition Units in the TTPF account linked to the Beneficiary's scholarship or grant should be used before Scholarship Tuition Units. The Beneficiary's parent or legal guardian who applied for the scholarship may contact the Foundation at 1-800-531-5441, ext. 3-8852, for additional information on use of Scholarship Tuition Units.

- This form is required every semester even if the Beneficiary attends the same Texas public 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 academic year.
- Be sure that, to the extent possible, you have already redeemed all available Tuition Units in the TTPF account linked to the Beneficiary's scholarship or grant.

Please allow 14 days to process this form.

Complete and return this form to:

Texas Match the Promise Foundation
P.O. Box 13232
Austin, Texas 78711-3232

Or send via email or fax to:

match.the.promise@cpa.texas.gov
512-463-4208 (fax)

1 | Purchaser Information

Please enter the Purchaser information below.

Texas Tuition Promise Fund (TTPF) account number linked to the Beneficiary's scholarship or grant

Purchaser's Last name (including suffix)

First name

M.I.

Purchaser's Social Security or Taxpayer ID number

Street address

City

State

Zip

()

()

Home telephone number

Daytime telephone number

Email address

2 | Beneficiary Information

Please complete the following information about the Beneficiary.

Beneficiary's Last name (including suffix)	First name	M.I.
Beneficiary's Social Security or Taxpayer ID number		
Street address		
City	State	Zip
()		
Telephone number		
Email address		

3 | Authorize Redemption of Scholarship Tuition Units

Please complete the following information about the Texas public college or university the Beneficiary will be attending.

School name	()	
School campus/location	School's telephone number	
School address (number and street)		
City	State	Zip

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

- 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 school for the student identification number.

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

- Term (select one) Fall
 Spring
 Summer (Full semester)
 Summer 1 (First semester of summer school)
 Summer 2 (Second semester of summer school)

Academic Year _____
For instance, you may have selected Fall above for the 2018-2019 Academic Year.

Optional: This form authorizes the use of available Scholarship Tuition Units as needed for the term and academic year specified above. You can limit the number of Scholarship Tuition Units to be redeemed for your Beneficiary for the Academic Year and Term specified above by completing the following:

- I want to cap the number of Scholarship Tuition Units to be redeemed at _____ (enter number).

4 | Refund Certification

If the Foundation awarded your Beneficiary a Match the Promise scholarship or grant, a refund (nonqualified withdrawal) from the Texas Tuition Promise Fund (TTPF) account linked to the scholarship award could reduce or forfeit that award.

Have you requested a refund from the TTPF account linked to the scholarship or grant since the time of award in fifth through ninth grade?

- Yes
 No

5 | Signature

I confirm that I am the Purchaser of the Texas Tuition Promise Fund (TTPF) account linked to the Beneficiary's Match the Promise scholarship or grant, and certify that the information I have provided with respect to my TTPF account is true, complete and accurate.

I understand that the TTPF program will redeem Scholarship Tuition Units awarded to the Beneficiary for undergraduate tuition and school-wide required fees at a Texas public college or university up to the amount of available Scholarship Tuition Units or fewer if specified on the previous page. Further, I understand that any additional amounts due to the school for tuition and fees not paid by the Scholarship Tuition Units are the full responsibility of either the Purchaser or the Beneficiary and must be paid by the school's deadline or the Beneficiary's classes may be cancelled or other penalties may be imposed by the school.

Signature of Purchaser

Date

The Texas Tuition Promise Fund® is established and maintained by the Texas Prepaid Higher Education Tuition Board. NorthStar Financial Services Group, LLC ("NorthStar") is the plan manager and the Texas Tuition Promise Fund is distributed by NorthStar affiliate Northern Lights Distributors, LLC and administered by NorthStar affiliate Gemini Fund Services, LLC. Some states offer favorable tax treatment to their residents only if they participate in the state's own plan. Non-residents of Texas should consider whether their state offers its residents a 529 plan with alternative tax advantages and should consult their tax advisor. The Contracts are not deposits or other obligations of any depository institution. Neither a Contract nor any return paid with a refund is insured or guaranteed by the FDIC, the state of Texas, the Texas Prepaid Higher Education Tuition Board, any other state or federal governmental agency or NorthStar or its subsidiaries or affiliates. The Contracts have not been registered with the U.S. Securities and Exchange Commission or with any state.

Purchasers should carefully consider the risks, administrative fees, service and other charges and expenses associated with the Contracts, including plan termination and decreased refund or transfer value. The Plan Description and Master Agreement contain this and other information about the Plan, and may be obtained by visiting www.texastuitionpromisefund.com or calling 1.800.445.GRAD (4723), option #5. Purchasers should read these documents carefully before purchasing a Contract.

Comments or complaints may be forwarded to the Prepaid Higher Education Tuition Program, Office of the Comptroller of Public Accounts at P.O. Box 13407, Austin, Texas 78711-3407, or by calling 1-512-936-2064.

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September 1, 2018