

Texas College Savings Plan®

Change of Beneficiary Form



Under Texas law, the new Designated Beneficiary must be a “member of the family” of the former Designated Beneficiary as defined by federal law and described in the Plan Description and Savings Trust Agreement.

- For UGMA/UTMA, the Beneficiary cannot be changed.
- A change in Beneficiary might result in a gift tax or generation skipping transfer tax. See Plan Description and consult your tax advisor.

Forms can be downloaded from our website at www.texascollegesavings.com or by calling a Customer Service Representative at **1.800.445.GRAD (4723)**, **option #3**, Monday through Friday from 8am to 6pm Central Time.

Return this form and any other required documents to:

The Texas College Savings Plan
c/o NorthStar Financial Services Group, LLC
P.O. Box 540010
Omaha, NE 68154

Or **Fax to:** 402.431.4452

1 | Current Account Information

Account number

Name of Account Owner (first, middle, last)

Social Security number or
Individual Taxpayer ID number

Name of Beneficiary (first, middle, last)

Social Security number

2 | New Designated Beneficiary Information

There are restrictions regarding the change of Beneficiary. Please refer to the Plan Description and Savings Trust Agreement for details.

Name of Designated Beneficiary (first, middle, last)

Social Security number

Street address (no P.O. Boxes)

Date of Birth (mm/dd/yyyy)

City

State

Zip

U.S. Citizen/Resident Alien (Nonresident aliens are not eligible to participate in the Program.)

3 | Transfer Amount

Do you already have an account for the new Beneficiary?

- Yes. Account number: _____
- No

Choose how you would like to change your investment selections.

- No Change to Current Investment Selections**
- Entire Balance.** The Program will close the account you indicate in Section 1 and will transfer all of the assets to an account for your new Beneficiary. If the amount you want transferred to the new Beneficiary exceeds the maximum contribution allowance—or if the amount of your transfer causes the aggregate balance of all existing Program accounts for the new Beneficiary to exceed the maximum contribution allowance—the excess will remain in the account designated for your original Beneficiary under your current account number.
- Partial Balance.** The Program will keep your account open for the original Beneficiary. The dollar amount or percentage you specify below will be transferred to the new Beneficiary's account. If you are invested in more than one investment option, the dollar amount or percentage will be taken out on a proportional basis from each investment option based on your Elected Investment Allocation on file. If the amount you want transferred to the new Beneficiary exceeds the maximum contribution allowance—or if the amount of your transfer causes the aggregate balance of all existing Program accounts for the new Beneficiary to exceed the maximum contribution allowance—the excess will remain in the account designated for your original Beneficiary under your current account number.
 \$ _____ or _____ %
 Dollar Amount Percentage

If you have already established an account for the new Beneficiary and provided the account number above, proceed directly to Section 6. Otherwise, complete all remaining sections.

4 | Investment Options

REQUIRED: Provide the anticipated year the Designated Beneficiary will begin college: _____

State/Local Government or 501(c)(3) Organizations Only: If you choose the Age Based Portfolio and have not indicated a new beneficiary at this time, please indicate the specific portfolio in which you would like your contributions to be deposited. Please see the Plan Description and Savings Trust Agreement.

Portfolio(s) selected: _____

- I want to keep the same investment options for my new Beneficiary. If you are invested in an age-based allocation and the new Beneficiary is in a different age bracket than the original Beneficiary, your asset allocation will change.
- I want to establish a new investment allocation for this account.

Portfolio Option	Allocation
I. Age Based Portfolios	
Index Age Based Portfolio	%
Blended Age Based Portfolio	%
II. Blended Static Portfolios	
Blended 100% Equity Portfolio	%
Blended Balanced Portfolio	%
III. Index Static Portfolios	
Index 100% Equity Portfolio	%
Index Balanced Portfolio	%
IV. Individual Portfolios	
Fixed Income Portfolio	%
Inflation Protected Bond Portfolio	%
U.S. Government Money Market Portfolio ¹	%
Total	100%

Elected Investment Allocation (EIA)

All future contributions will be allocated in the same manner as selected above within Sections I, II, III or IV. Changes to your EIA can be made online at www.texascollegesavings.com or by calling a Customer Service Representative at 1.800.445.GRAD (4723), option #3.

