

# Third Party Access Form



## Instructions

Fax this form to 402-431-4452

or mail it to:

Texas College Savings Plan  
P.O. Box 540010  
Omaha, NE 68154

Please grant \_\_\_\_\_ (name of party to whom you are granting account access) permission to request information regarding my Texas College Savings Plan® account(s) identified below. I understand that the party named above will not be able to authorize transactions on the account(s) in any way and that the permission I grant will remain in effect until such time that I revoke the permission.

## Account Information

\_\_\_\_\_  
Account number

\_\_\_\_\_  
Account number

\_\_\_\_\_  
Account number

\_\_\_\_\_  
Account Owner's first name

\_\_\_\_\_  
Middle initial

\_\_\_\_\_  
Last name

\_\_\_\_\_  
Account Owner's street address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Account Owner's phone number

\_\_\_\_\_  
Account Owner's signature

\_\_\_\_\_  
Date

The Texas College Savings Plan® (“Plan”) is administered by the Texas Prepaid Higher Education Tuition Board (“Board”). Orion Advisor Solutions, Inc. is the plan manager. The Plan and the Board do not provide legal, financial, or tax advice and participants in the Plan should consult a legal, financial, or tax advisor before investing. Fees and charges for the most recent quarter are available on our website at: [www.texascollegesavings.com/expenses](http://www.texascollegesavings.com/expenses).

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.

An account could lose money including the principal invested. No part of an account is a deposit or obligation of, or is guaranteed or insured by, the Board, the state of Texas, or any agency or agent thereof. Interests in the Plan have not been registered with or approved by the SEC or any state. Investors should carefully consider the investment objectives, risks, fees, charges, and expenses associated with municipal fund securities. The Board may suspend, modify, or terminate the Plan or change investment approaches, offerings, and/or underlying investment funds at any time and without the consent of account owners or beneficiaries. The Plan Description and Savings Trust Agreement contain this and other important information about the Plan and may be obtained by visiting [www.texascollegesavings.com](http://www.texascollegesavings.com) or calling 800-445-GRAD (4723), option #3. Investors should read all Plan documents carefully before investing.

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