

Account Maintenance Form



TEXAS TUITION
PROMISE FUND™
A Prepaid Plan as Smart as You Are

Instructions

Please use this form to make any of the following changes:

- Change Address
- Add or Change Social Security Number
- Add or Change Successor Purchaser
- Add or Change Automatic Withdrawal
- Update Bank Account Information

All changes require the Purchaser's information in Section I, and a signature in Section VI. Please read the applicable instructions for each section.

Forms can be downloaded from our website at www.texas tuition promise fund.com, or by contacting a Customer Service Representative at **1.800.445.GRAD (4723)**, option #5, Monday through Friday 8am to 6pm Central Time.

Return this form and any other required documents to:
Texas Tuition Promise Fund®
P.O. Box 44305 Jacksonville,
FL 33231-4305 Fax:
1.800.519.4652

Section I. | Current Purchaser

Please enter the current Purchaser information below:

Texas Tuition Promise Fund (TTPF) Account Number

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

Social Security or Taxpayer ID Number

()

Street Address

Telephone Number

City

State

Zip

Section II. | Address Change(s)

Address and contact information can also be updated online at www.texas tuition promise fund.com

This address change applies to: Purchaser Beneficiary Both (If the Beneficiary's address is different than the Purchaser, fill out this entire section.) Successor Purchaser

New Street Address (Do not use P.O. Box)

()

Telephone Number

City

State

Zip

()

Work/Alternate Phone Number

Email Address

If the Beneficiary's address is different, please complete the information below:

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

Email Address

Street Address

()

Home Phone Number

City

State

Zip

()

Work/Alternate Phone Number

Section III. | Successor Purchaser

Complete this section to designate a new or change the existing Successor Purchaser on your account.

You cannot designate a Successor Purchaser for a UGMA/UTMA account.

You may name a Successor Purchaser for the Account. In the event of your death, ownership of all assets in the Account will be transferred to the Successor Purchaser. The Successor Purchaser will assume all rights that the previous Purchaser had. During the life of the Purchaser, the Successor Purchaser may receive contract information, but cannot make any changes to the contract. Enforceability of a Successor Purchaser designation may vary by state. Check with your estate planning attorney.

- Add a Successor Purchaser using the information provided below. This designation overrides any previous designation(s).
- I certify that the Successor Purchaser is a U.S. citizen/Resident alien. (Nonresident aliens are not eligible to participate in the program.)

Successor Purchaser Name (First, middle, last including suffix)

Street Address

City State Zip Social Security or Taxpayer ID Number

() _____ () _____
Home Phone Number Work/Alternate Phone Number

Section IV. | Add/Change Social Security Number

You must include a copy of the Social Security card with this form.

Complete this section to update or change a Social Security number on your Account.

Current Contract Information

Texas Tuition Promise Fund Account Number _____

Current Purchaser _____

Home Phone Number () _____

Work/Alternate Phone Number () _____

Current Beneficiary _____

The Social Security/Tax I.D. Number update applies to:

Purchaser _____
Name Social Security Number or Tax I.D. Number

Beneficiary _____
Name Social Security Number

Section V. | Automatic Withdrawal Authorization

Set up automatic payments to your TTPF Account.

Save time and postage by signing up for automatic withdrawal of your TTPF monthly payment. This option is not available for annual installments or lump sum payments. Payments will be deducted from your checking or savings account on the 1st day of each month (or the next business day when that date is on a weekend or a holiday). A record of these payments will appear on your checking or savings account statement. Please allow 10 days to process debit(s) from your account. You will be notified in writing when the automatic payments are scheduled to begin.

- I would like to establish a new automatic payment
- I would like to update my existing automatic payment (**must be processed by the 25th of the month to take effect for the next month's debit withdrawal**)
- I would like to cancel my automatic payment (**must be processed by the 25th of the month to take effect for the next month's debit withdrawal**)

Bank Account Owner Last name (including suffix)

First name

M.I.

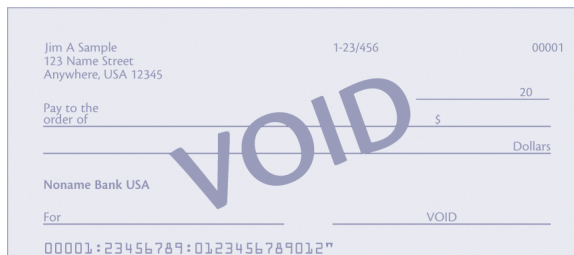
- If you selected an installment plan, your monthly debit amount will be your installment payment amount.
- If you selected Pay-As-You-Go, please state the amount you want to deduct from your checking or savings account each month (\$15 minimum): \$ _____

I hereby authorize TTPF to initiate debit entries for the monthly payment amount and to initiate, if necessary, credit entries and adjustments for any debit entries in error to my account. This authority is to remain in full force and effect until the account is paid in full, or TTPF has received written notification from me of its termination. I agree to provide adequate notice (normally 10 days) to terminate this service. In the event of unsuccessful debits, I understand that TTPF reserves the right to cancel this authorization and will notify me in writing of such action and that returned payment and/or late fees may be charged to my TTPF account.

Signature of Purchaser (or bank account holder if different than Purchaser)

Date

ATTACH A VOIDED CHECK OR SAVINGS ACCOUNT DEPOSIT SLIP WITH PREPRINTED NAME AND ACCOUNT NUMBER OR COMPLETE THE SECTION BELOW:



Complete the following information if you did not attach a voided check or a savings account deposit slip. If using a savings account, please confirm the routing number and account number with your financial institution.

Type of Account: Checking Savings

Name of Bank Account Holder

Name of Financial Institution

Account Number

Transit Routing Number

Financial Institution Address (City, State, Zip)

Section VI. | Account Agreement

I certify that the information I have provided with respect to my Texas Tuition Promise Fund account is true, complete, and correct. I have received, read, and agree to the terms set forth in the Plan Description and Master Agreement.

I understand that if I am naming or changing the Successor Purchaser in Section III, I certify that it is my intent to name a new Successor Purchaser and, if applicable, revoke the previous Successor Purchaser. I agree to notify my Successor Purchaser of his/her status, and that he/she will need to provide a certified copy of a death certificate or other legally acceptable proof of death identifying me by name upon my death.

Purchaser Signature

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 Northern Lights Distributors, LLC and administered by Gemini Fund Services, LLC. Northern Lights Distributors, LLC and Gemini Fund Services, LLC are not affiliated with NorthStar Financial Services Group, 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.

“Texas Tuition Promise Fund” is a registered mark of the Texas Prepaid Higher Education Tuition Board. All rights reserved. The Texas Tuition Promise Fund is distributed by Northern Lights Distributors, LLC. Member FINRA, SIPC
17605 Wright Street, Omaha, NE 68130