

Change of Purchaser Form



Instructions

Please use this form to update or change the existing Purchaser on your Texas Tuition Promise Fund® account. **The Signature Guarantee Section must be completed for a Change of Purchaser to take effect.**

Forms are available on our website at www.texas tuition promise fund.com, or by calling 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 to:

Texas Tuition Promise Fund
P.O. Box 44305
Jacksonville, FL 32231-4305

Section I. | Type of Change

Purchaser Name Change Only

Updating purchaser name due to qualifying event, i.e., marriage, divorce, etc. (attach appropriate documentation).

Transfer Account to New Purchaser (Signature Guarantee Required)

You must fill out Sections II, IV and V. The following supporting documentation is required for Change of Purchaser due to death only:

- If you are the current Successor Purchaser named on the account, a copy of the death certificate is required.
- If no Successor Purchaser is named on the account, a copy of the death certificate and the appropriate court documents are required.

Section II. | Current Purchaser

Please enter the existing Purchaser information below:

Texas Tuition Promise Fund Account number

Name of Purchaser on Account (First, middle, last including suffix)

()

Home Telephone Number

Social Security or Taxpayer ID Number

()

Daytime Telephone Number

Name of Current Beneficiary (First, middle, last including suffix)

Social Security Number

Section III. | Name Change Only

Purchaser Name Change Only:

Purchaser's New Name due to marriage, divorce, or other qualifying event (First, middle, last including suffix)

Section IV. | New Purchaser Information

Transfer Account to New Purchaser:

Name of New Purchaser (First, middle, last including suffix)			Social Security or Taxpayer ID Number
Street Address (number and street, including apartment number, no P.O. Boxes)			()
City	State	Zip	Home Telephone Number
Email Address			()
			Daytime Telephone Number

If the Purchaser is an organization, please indicate type:

- Corporation, Partnership, or LLC (enclose copy of certificate of formation)
- Estate
- Trust (enclose copy of trust instrument)
- 501(c)(3) (enclose copy of ruling determination letter from IRS)
- Other

Section V. | Account Agreement and Signature Guarantee

For Current Purchaser:

I certify that the information I have provided is true, complete, and accurate. I have received, read, and agreed to the terms set forth in the Plan Description and Master Agreement. I certify that by executing this form, I relinquish all rights and responsibilities of the contract to the new Purchaser.

x		
Signature of Current Purchaser		Date
x		
Signature of Executor (in cases of death only)		Date

For New Purchaser:

I certify that the information I have provided is true, complete, and accurate. I have received, read, and agreed to the terms set forth in the Plan Description and Master Agreement.


x		
Signature of New Purchaser		Date

A Signature Guarantee is only required if you are transferring your account to a New Purchaser.

Signature Guarantee—A Signature Guarantee may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, savings associations, credit unions and brokerage firms. The words "SIGNATURE GUARANTEED" must be stamped or typed near the signature(s) being guaranteed. The guarantee must appear with the printed name, title, and signature of an officer and the name of the guarantor institution. A NOTARY PUBLIC STAMP OR SEAL IS NOT ACCEPTABLE.

Affix medallion stamp here:

Guarantee's First Name, Middle Initial, Last Name (if required)	Title
x	
Signature Guarantee	Date



The Texas Tuition Promise Fund® (“Plan”) is administered by the Texas Prepaid Higher Education Tuition Board (“Board”) and 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 prior to purchasing a contract.

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. Non-residents of Texas should consider whether their home state, or the beneficiary’s home state, offers 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.

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 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 covered at a Texas public college or university; or (2) the original purchase price plus or minus net investment earnings or losses. The Plan Description and Master Agreement contains this and other information about the Plan and may be obtained by visiting www.texas tuition promise fund.com or calling 800-445-GRAD (4723), option #5. Purchasers should read all Plan documents carefully before purchasing a contract.

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