



Application

Instructions

1. Read about Texas Tuition Promise Fund® (“TTPF”) in the program enrollment kit or on our website at www.texastuitionpromisefund.com. The Plan Description and Master Agreement (“Plan Description”) must be read by the Purchaser prior to signing this Application. By signing this Application, you are agreeing to be bound by the terms of the Plan Description and this Application, and you are certifying that you meet all eligibility requirements of the program. If you need assistance completing this application, please call toll-free 800-445-GRAD (4723), option #5, Monday through Friday from 8am to 6pm Central Time. You can also enroll online at www.texastuitionpromisefund.com.
2. Complete all sections of the application to open a contract. Your contract will consist of this completed application that certifies you agree to the terms of the then current Plan Description and the applicable Pricing Schedule(s). TYPE or PRINT all information except your signature. **Sign and date your application.** A separate application must be submitted for each Beneficiary. **This application form may be photocopied.**
3. The application fee is \$25 for the first contract purchased for each Beneficiary. If you are the Purchaser and you have an existing TTPF contract for the same Beneficiary, the application fee is assessed only once.
4. Please enclose a check or money order made payable to TTPF for the application fee. We will not accept third-party checks. **THE APPLICATION FEE IS NOT REFUNDABLE.**
5. **Mail the completed application and application fee postmarked no later than February 28, 2022**, in the attached envelope or to **Texas Tuition Promise Fund, P.O. Box 44306, Jacksonville FL 32231-4306**. Multiple applications may be mailed in the same envelope. Multiple application fees can be paid with one check or money order.
6. **Applications will be accepted through July 31, 2022, for “Newborns” (children less than one year of age at the time the application is received).** The first payment for Newborns enrolled after February 28, 2022, will be due approximately 60-90 days after the application is received.
7. You will be billed based on the plan and payment method selected. Contract payments may be sent at any time prior to the due date, but will not be due until May 1, 2022. **You can cancel a pending contract application any time between September 1, 2021, and April 30, 2022, and receive a full refund of any payments received during this time, less the application fee. You will not receive any earnings on such cancellations.** Contract payments must be made by check, money order, ACH, or payroll deduction. Do not send cash.
8. After your application is processed, you will receive program documents and information about making payments. Please allow up to 2 weeks for receipt of this information.

Applications must be postmarked by February 28, 2022 (or July 31, 2022, for Newborns).

OFFICE USE ONLY			
Check Number _____	Check Amount _____	Related Applications _____	Other _____

SECTION I. | Purchaser Information

Please complete the following information about YOURSELF, the person purchasing the TTPF contract (the “Purchaser”). You must be at least 18 years of age.

The Purchaser is the owner of the account and the person who is entitled to any refund if the contract is canceled.

If you are establishing a UGMA/UTMA account, you must submit a completed UGMA/UTMA form with your Application.

Last name _____ 1. Mr. 2. Mrs. 3. Miss 4. Ms. 5. Dr. First name _____ M.I. _____
 (including Suffix)

Address (number and street, including apartment number)

City _____ State _____ Zip _____ County _____
 () ()

Social Security no. (or Taxpayer I.D. no.) _____ Home phone _____ Work phone _____

Email (if available)

- If the Purchaser is an organization, please indicate type:
- | | | |
|----------------|------------------------|----------|
| 1. Corporation | 4. Trust or Non-profit | 7. Other |
| 2. Estate | 5. Partnership | |
| 3. Company | 6. Association | |

Name of Organization _____

SECTION II. | Beneficiary Information

The Beneficiary is the person for whom you are buying the contract. At the time you sign this application, the Beneficiary must:

- be a resident of the state of Texas, or
- have a parent who is a resident of Texas and is the named Purchaser.

Please complete the following information about the Beneficiary:

Last name (including Suffix)		First name		M.I.
Address (number and street, including apartment number)				
City	State	Zip	County	Gender:
	()			1. Male 2. Female
Social Security no. (or Taxpayer I.D. no.)	Home phone			
Date of birth	Month	Day	Year	

Please check Beneficiary's age or current grade in school as of September 1, 2021. Please refer to the Plan Description for additional information if your beneficiary is in Ninth (or higher) grade as of this date. A projected high school graduation date will be calculated based on the date of birth provided.

1. Newborn—4 year old	5. Second	9. Sixth
2. 5 year old, not in school	6. Third	10. Seventh
3. Kindergarten	7. Fourth	11. Eighth
4. First	8. Fifth	12. Ninth or all others eligible to use benefits June 2024 or after
Beneficiary's relationship to Purchaser (check one) 1. Child 2. Grandchild 3. Friend 4. Other: _____		

SECTION III. | Successor Purchaser

The Successor Purchaser's rights are limited solely to control of the contract upon the death of the Purchaser. The Successor Purchaser may receive contract information, but cannot make any changes to the contract during the life of the Purchaser. The Successor Purchaser must be 18 years of age or older.

Last name (including Suffix)	1. Mr. 2. Mrs. 3. Miss 4. Ms. 5. Dr.	First name	M.I.
Address (number and street, including apartment number)			
City	State	Zip	County
	()		()
Social Security no. (or Taxpayer I.D. no.)	Home phone	Work phone	
If the Successor Purchaser is an organization, please indicate type: 1. Corporation 2. Estate 3. Company 4. Trust or Non-profit 5. Partnership 6. Association 7. Other			
Name of Successor Organization			

It is the Purchaser's responsibility to maintain up-to-date information on the Successor Purchaser.

SECTION VI. | Additional Information

We use the following information for statistical data. Individual responses will be kept confidential, but the overall data will be used for program evaluation. If you have any questions regarding our privacy policy, please refer to the Plan Description or visit our website at www.texas tuition promise fund.com.

How did you learn about the program?

- | | | | | |
|-----------------|-----------------------|--------------------------------|----------------------------------|------------------------------|
| 1. TV Ad | 4. Magazine Ad | 7. Family, Friend or Colleague | 10. Online Ad | 13. Promotional Event |
| 2. Radio Ad | 5. TV/Radio Interview | 8. Financial Professional | 11. Website/Internet | 14. Educational Presentation |
| 3. Newspaper Ad | 6. News Article | 9. Direct Mail | 12. Other, please specify: _____ | |

Indicate the Beneficiary's race/ethnicity.

- | | | | | | |
|----------|-------------------|----------|--------------------|--------------------|----------|
| 1. White | 2. Asian American | 3. Black | 4. Hispanic/Latino | 5. Native American | 6. Other |
|----------|-------------------|----------|--------------------|--------------------|----------|

Indicate your current annual household income level.

- | | | | |
|-------------------|--------------------|---------------------|-------------------|
| 1. Under \$50,000 | 2. \$50,000–75,000 | 3. \$75,001–100,000 | 4. Over \$100,000 |
|-------------------|--------------------|---------------------|-------------------|

Indicate your education level (select highest level completed).

- | | | | |
|-------------------------|-----------------|-----------------------|----------------------|
| 1. High school graduate | 2. Some college | 3. Associate's degree | 4. Bachelor's degree |
| 5. Master's degree | 6. Doctorate | | |

What other 529 plans do you currently own?

- | | | |
|--------------------------------|-----------------------------|----------------------------------|
| 1. Texas College Savings Plan® | 2. Texas LoneStar 529 Plan® | 3. Texas Guaranteed Tuition Plan |
| 4. Other: _____ | | |

Indicate your primary source of funding for this contract.

- | | | |
|------------------------|-------------------------|---------------------------|
| 1. Employment earnings | 2. Gifts or inheritance | 3. Tax refunds or credits |
| 4. Other: _____ | | |

SECTION VII. | Authorization

I hereby certify that the information on this application is true and accurate to the best of my knowledge and that I have read and agree to the terms of the Plan Description. I understand that my application may be returned or canceled if I materially misrepresent information I provide to the Texas Tuition Promise Fund® program. In signing below, I am agreeing to all terms and conditions of the Plan Description and this Application and certifying that all eligibility requirements, including residency requirements, have been met. I understand that installment payments will include a 6% interest component.

x

Signature of Purchaser (required)

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 the units would cover at a Texas public college or university; or (2) the original purchase price of the units plus or minus net investment earnings or losses on that amount. The Plan Description and Master Agreement contain 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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