

# Texas Tuition Promise Fund®

# Benefits

# Authorization Form



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

For Texas Public Colleges and Universities

## Instructions

Please use this form to authorize the redemption of Tuition Units (benefits) at a Texas public college or university ONLY (excludes medical and dental schools, health science centers and other health-related institutions).

- We require the Purchaser's authorization before we pay benefits to a Texas public college or university.
- This Form is required **every semester even if the Beneficiary attends the same college or university each semester.**
- Before you submit this form, make sure your Beneficiary is registered at the chosen school for the chosen term and academic year.
- Visit [www.texastuitionpromisefund.com](http://www.texastuitionpromisefund.com) to:
  - view/download the Student Handbook for details on using Texas Tuition Promise Fund® ("TTPF") benefits;
  - view FAQs on how to use TTPF benefits; and
  - view the most recent Tuition Unit Value redemption charts included at the back of the Academic Year Tuition Unit Pricing Schedule located under Forms & Literature on the website.

Forms are available on our website or by contacting a Customer Service Representative at **1.800.445.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  
Fax: 1.800.519.4652

## SECTION I. | Purchaser Information

Please enter the Purchaser information below:

\_\_\_\_\_  
Texas Tuition Promise Fund (TTPF) account number

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

\_\_\_\_\_  
Purchaser's Social Security or Taxpayer ID number

\_\_\_\_\_  
Street address (number and street, including apartment number)

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

( ) \_\_\_\_\_  
Home telephone number

( ) \_\_\_\_\_  
Daytime telephone number

\_\_\_\_\_  
Email address

## SECTION II. | Beneficiary Information

The Beneficiary is the person designated on the account for which you are authorizing use of Tuition Units to pay tuition and school-wide required fees at the chosen **Texas public college or university for the chosen term and academic year.**

**Please complete the following information about the Beneficiary:**

\_\_\_\_\_  
Last name (including suffix)

\_\_\_\_\_  
First name

\_\_\_\_\_  
M.I.

\_\_\_\_\_  
Beneficiary's Social Security number

\_\_\_\_\_  
Street address (number and street, including apartment number)

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

(       )

\_\_\_\_\_  
Telephone number

\_\_\_\_\_  
Email address

## SECTION III. | Authorize Redemption of Tuition Units and Payment to Texas Public College or University

**Name the Texas public college or university to be paid:**

\_\_\_\_\_  
School name

\_\_\_\_\_  
School campus/location (example: University of Texas—Dallas)

\_\_\_\_\_  
School address (number and street)

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

**Choose the term and academic year for which you are authorizing benefit payment:**

**Term (select one):**  Fall

Spring

Summer

**Academic Year:** \_\_\_\_\_

(For instance, you may have selected Fall above for the 2019-20 Academic Year.)

**Provide your Beneficiary's student identification number provided by the above school:**

\_\_\_\_\_  
Student identification number

- A student identification number is assigned to a student upon first entering or registering with an educational institution and is used to identify the student in lieu of a name or Social Security number for grades, essays, projects, exams and official documents.
- We require the student identification number before we pay benefits to a Texas public college or university. If you do not have the number, please contact the Beneficiary's school for the student identification number.

**Optional: You can limit the number of Tuition Units to be redeemed for your Beneficiary for the Academic Year and Term specified above by completing the following:**

I want to cap the number of Tuition Units to be redeemed at \_\_\_\_\_ (enter number).

## SECTION IV. | Purchasers with Multiple Contracts for the SAME Beneficiary

### Important:

If you have multiple accounts (contracts) for the SAME beneficiary that have mature Tuition Units available for redemption, please choose one:

- Yes, apply this authorization to all of my accounts with available (mature) Tuition Units for this Beneficiary. I understand that you will use all available Tuition Units necessary to cover the total amount billed by the school for tuition and school-wide required fees covered by the plan up to the number of Tuition Units available, if necessary.
- No, apply this authorization only to this contract.

## SECTION V. | Signature

I confirm that I am the Purchaser of the account indicated above and certify that the information I have provided, with respect to my Texas Tuition Promise Fund (TTPF) account is true, complete, and accurate. I acknowledge that I have received, read, and agree to the terms set forth in the Plan Description and Master Agreement.

By signing below, I acknowledge my understanding that TTPF pays only tuition and school-wide required fees at Texas public colleges or universities up to the amount of available Tuition Units on the account indicated above. Further, I understand that any additional amounts due to the school for tuition and fees not paid by TTPF are the full responsibility of either the Purchaser or the Beneficiary and must be paid by the deadline set by the school or the classes may be cancelled or the school may impose a penalty for late payment. I further understand that any refunds related to dropped classes after the school has billed TTPF, are between the Beneficiary and the school and that no Tuition Units will be restored to the account(s) designated above as a result of dropped classes after the school has billed TTPF.

X \_\_\_\_\_  
Signature of Purchaser 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 subcontractors to NorthStar and are otherwise not affiliated with NorthStar. 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](http://www.texastuitionpromisefund.com) or calling 1.800.445.GRAD (4723), option #5. Purchasers should read these documents carefully before purchasing a Contract.**

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