

# Employee Payroll Deduction Form

## Instructions

Please complete this form to establish, change or delete payroll deduction instructions for your existing Texas College Savings Plan® account(s). If you do not have an account, please attach a completed Enrollment Application (one per beneficiary) or open an account online at [www.texascollegesavings.com](http://www.texascollegesavings.com). Before completing this form, check with your payroll department regarding the availability of this service. Your payroll department must complete and submit an Employer Authorization Payroll Deduction Form before you can begin payroll deduction.

If you have any questions about this form, please call **1.800.445.GRAD (4723), option #3**, Monday through Friday from 8am to 6pm Central Time.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ☐ not ☒ not ☒

### 1 | Employee/Company Information

Employee's first name	Middle initial	Last name	Social Security number
			(      )
Company name			Company phone number
Company contact			

### 2 | Payroll Deduction Information

- A. ☐ Establish a new payroll deduction      ☐ Cancel existing deduction  
☐ Change allocation percentage      ☐ Change deduction amount

#### B. Payroll Deduction Amount

Indicate the amount to be deducted from your paycheck each pay period. The minimum investment is \$15 per month per portfolio.

Total Deduction Amount \$ \_\_\_\_\_

This dollar amount will be invested according to your Elected Investment Allocation on file at the time the assets are received. If you are establishing a new account, the assets will be invested according to your instructions on the Enrollment Application.

Account number	Beneficiary's name	Percentage of deduction to be allocated to each account (full % only)
		.00%
		.00%
		.00%
		.00%
<b>Total</b>		<b>100.00%</b>

Continued on next page

Employee's Signature

Date

***All Employees***

**Make two copies of this Employee Payroll Deduction Form and:**

- 1. Retain a copy for your records.**
- 2. Provide a copy of this form to your Human Resources Department once you obtain your Texas College Savings Plan account number so they can initiate the payroll deduction.**

**Your Human Resources Department will send a copy of the Form to the Texas College Savings Plan at:**

**The Texas College Savings Plan  
c/o NorthStar Financial Services Group, LLC  
P.O. Box 540010  
Omaha, NE 68154**

This material is provided for general and educational purposes only and is not intended to provide legal, tax or investment advice, or for use to avoid penalties that may be imposed under U.S. federal tax laws. Contact your attorney or other advisor regarding your specific legal, investment or tax situation.

The Texas College Savings Plan® is established and maintained by the Texas Prepaid Higher Education Tuition Board and distributed by Northern Lights Distributors, LLC, Member FINRA/SIPC. NorthStar Financial Services Group, LLC, the parent company of Northern Lights Distributors, LLC, is the Plan manager and administrator of the Plan.

As stated in the current Plan Description and Savings Trust Agreement, total Plan fees for the portfolios range from 0.60% to 1.00%, including six index age-based portfolios ranging from 0.60% to 0.62%. Fees are subject to change.

Some states offer favorable tax treatment to their residents only if they invest 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. Interests in the Plan are not deposits or other obligations of any depository institution.

No part of an account, the principal invested nor any investment return, 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 affiliates. An account might not make money and could lose money (including the principal invested) if money is invested in the Plan. Interests in the Plan have not been registered with the U.S. Securities and Exchange Commission or with any state.

**Before investing in the Plan, investors should carefully consider the investment objectives, risks, administrative fees, service and other charges and expenses associated with municipal fund securities. The Plan Description and Savings Trust Agreement contains this and other information about the Plan and may be obtained by visiting [www.texascollegesavings.com](http://www.texascollegesavings.com) or calling 1.800.445.GRAD (4723), Option #3. Investors should read these documents carefully before investing.**

Comments or complaints may be forwarded to the Prepaid Higher Education Tuition Program, Office of the Comptroller of Public Accounts, at P.O. Box 13407, Austin, Texas 78711-3407 or at 1.512.936.2064.

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