

Employer Authorization— Payroll Deduction Form



Instructions

Please complete this form to establish payroll deductions for the Texas College Savings Plan® for your employees. This form must be completed and submitted prior to the Plan's acceptance of contributions from any of your employees.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ☑

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

Once completed, please send or fax this form to Texas College Savings Plan at the following address:

Regular Mail:

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

Fax: 1.402.431.4452

1 | Employer Information

Company name

Federal Tax ID number

Company street address

City

State

Zip

Contact person

()

Telephone number

Title

()

Fax number

Email address

Number of employees in company

Continued on next page

- A. Approximate date company plans to begin payroll deduction (mm/yyyy): _____
- B. Frequency of deposits: ☐ Weekly ☐ Biweekly ☐ Monthly ☐ Quarterly ☐ Other _____
- C. Do you use a third-party vendor? ☐ No ☐ Yes, name of vendor: _____
- D. How do you intend to send in contributions?
- ☐ **Via check—You must send a spreadsheet of employee names, account numbers and dollar amounts.**
 Fax to 1.402.431.4452 or email to TexasCSP529@nstar-financial.com.
 Make check payable and mail to:
 Texas College Savings Plan
 c/o NorthStar Financial Services Group, LLC
 P.O. Box 540010
 Omaha, NE 68154
 - ☐ **Via wire for ALL employees—Please send one consolidated contribution amount for ALL employees using the instructions below. You must send a spreadsheet of employee names, account numbers and dollar amounts.**
 Fax to 1.402.431.4452 or email to TexasCSP529@nstar-financial.com.
 Send wires as follows:
 First National Bank
 ABA# 104000016
 Account Name: Texas 529 Plan
 Account# 110427887
 For Further Credit: *(insert Company Name)*
 For Further Credit Account Number(s): *(insert applicable account numbers)*
 - ☐ **Via ACH for EACH employee by account number—Send an Individual ACH for EACH employee using these instructions:**
 First National Bank
 ABA # 104000016
 Account # 9108369 _____
 (Your employee's 10-digit account number)

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 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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 17605 Wright Street, Omaha, NE 68130
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TX0000.307.0414 September 1, 2014

