

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 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, please call us at 800-445-GRAD (4723), option #3, Monday through Friday from 8am to 6pm Central Time.

Print clearly in all CAPITAL LETTERS using blue or black ink.

When requested, please 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%
Total		100.00%

Continued on next page

x

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****P.O. Box 405010****Cincinnati, OH 45240****Or Fax to: 402-431-4452**

The Texas College Savings Plan® (“Plan”) is administered by the Texas Prepaid Higher Education Tuition Board (“Board”). Orion Advisor Solutions, Inc. (“Orion”) is the manager for the Plan, which is distributed by Northern Lights Distributors, LLC and maintained by Gemini Fund Services, LLC, neither of which are affiliated with Orion. The Plan and the Board do not provide legal, financial, or tax advice and you should consult a legal, financial, or tax advisor before participating.

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

Estimated total asset-based fees are available on the Allocation Worksheet at TexasCollegeSavings.com/Allocation-Worksheet and are published in the Plan Description and Savings Trust Agreement, which is reviewed annually. Fees are subject to change.

An account could lose money including the principal invested. No part of an account is a deposit or obligation of, or is guaranteed or insured by, the Board, the state of Texas, or any agency or agent thereof. Interests in the Plan have not been registered with or approved by the SEC or any state. Investors should carefully consider the investment objectives, risks, fees, charges, and expenses associated with municipal fund securities. The Board may suspend, modify, or terminate the Plan or change investment approaches, offerings, and/or underlying investment funds at any time and without the consent of account owners or beneficiaries. The Plan Description and Savings Trust Agreement contain this and other important information about the Plan and may be obtained by visiting TexasCollegeSavings.com or calling 800-445-GRAD (4723), option #3. Investors should read the Plan Description and Savings Trust Agreement, and all other Plan documents carefully before investing.

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