

Third Party Access Form



Instructions

Please grant the party named below permission to request information regarding my Texas College Savings Plan® account(s) identified below. I understand that this party will not be able to authorize transactions on the account(s) in any way and that the permission I grant will remain in effect until such time that I revoke the permission.

Full name

If you have questions or would like help completing this form, please call us at **800-445-GRAD (4723), option #3**, Monday through Friday from 8am to 6pm Central Time. Return this form and any required documents to:

Texas College Savings Plan
P.O. Box 405010
Cincinnati, OH 45240
or **Fax to: 402-431-4452**

Account Information

Account number

Account number

Account number

Account Owner's first name

Middle initial

Last name

Account Owner's street address

City

State

Zip

Account Owner's phone number

x

Account Owner's signature

Date

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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