



# Approval Request to Use Scholarship Tuition Units

For Recipients of Texas Match the Promise Foundation<sup>SM</sup> Scholarships and Grants

## Instructions

If the Texas Match the Promise Foundation<sup>SM</sup> awarded the Beneficiary of your Texas Tuition Promise Fund<sup>®</sup> (TTPF) account a matching scholarship or tuition grant in grades five through nine, you can use this form to request approval to use those Scholarship Tuition Units. Scholarship Tuition Units can be applied toward the cost of undergraduate resident tuition and schoolwide required fees at Texas public colleges and universities ONLY. Scholarship Tuition Units cannot be used at medical and dental institutions, private and out-of-state colleges and universities, career schools and registered apprenticeship programs.

Please note that, to the extent possible, available Tuition Units in the TTPF account linked to the Beneficiary's scholarship or grant should be used before Scholarship Tuition Units. The Beneficiary's parent or legal guardian who applied for the scholarship may contact the Foundation at 800-531-5441, ext. 3-8852, for additional information on use of Scholarship Tuition Units.

- This form is required every semester even if the Beneficiary attends the same Texas public 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.
- Be sure that, to the extent possible, you have already redeemed all available Tuition Units in the TTPF account linked to the Beneficiary's scholarship or grant.

Please allow 14 days to process this form.

**Complete and return this form to:**

Texas Match the Promise Foundation  
P.O. Box 13232  
Austin, Texas 78711-3232

**Or send via email or fax to:**

match.the.promise@cpa.texas.gov  
512-463-4208 (fax)

## 1 | Purchaser Information

Please enter the Purchaser information below.

Texas Tuition Promise Fund (TTPF) account number linked to the Beneficiary's scholarship or grant

Purchaser's Last name (including suffix)

First name

M.I.

Purchaser's Social Security or Taxpayer ID number

Street address

City

State

Zip

( )

( )

Home telephone number

Daytime telephone number

Email address

## 2 | Beneficiary Information

Please complete the following information about the Beneficiary.

Beneficiary's Last name (including suffix)	First name	M.I.
Beneficiary's Social Security or Taxpayer ID number		
Street address		
City	State	Zip
(      )		
Telephone number		
Email address		

## 3 | Authorize Redemption of Scholarship Tuition Units

Please complete the following information about the Texas public college or university the Beneficiary will be attending.

School name	(      )	
School campus/location	School's telephone number	
School address (number and street)		
City	State	Zip

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

- 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 school for the student identification number.

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

- Term (select one) ☐ Fall  
☐ Spring  
☐ Summer (Full semester)

Academic Year \_\_\_\_\_  
For instance, you may have selected Fall above for the 2021-2022 Academic Year.

**Optional:** This form authorizes the use of available Scholarship Tuition Units as needed for the term and academic year specified above. You can limit the number of Scholarship 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 Scholarship Tuition Units to be redeemed at \_\_\_\_\_ (enter number).

## 4 | Refund Certification

If the Foundation awarded your Beneficiary a Match the Promise scholarship or grant, a refund (nonqualified withdrawal) from the Texas Tuition Promise Fund (TTPF) account linked to the scholarship award could reduce or forfeit that award.

Have you requested a refund from the TTPF account linked to the scholarship or grant since the time of award in fifth through ninth grade?

- ☐ Yes  
☐ No

## 5 | Signature

I confirm that I am the Purchaser of the Texas Tuition Promise Fund (TTPF) account linked to the Beneficiary's Match the Promise scholarship or grant, and certify that the information I have provided with respect to my TTPF account is true, complete and accurate.

I understand that the TTPF program will redeem Scholarship Tuition Units awarded to the Beneficiary for undergraduate resident tuition and schoolwide required fees at a Texas public college or university, excluding medical and dental institutions, up to the amount of available Scholarship Tuition Units or fewer if specified on the previous page. Further, I understand that any additional amounts due to the school for tuition and fees not paid by the Scholarship Tuition Units are the full responsibility of either the Purchaser or the Beneficiary and must be paid by the school's deadline or the Beneficiary's classes may be cancelled or other penalties may be imposed by the school.

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Signature of Purchaser

Date

The Texas Tuition Promise Fund® ("Plan") is administered by the Texas Prepaid Higher Education Tuition Board ("Board") and Orion Advisor Solutions, Inc. is the plan manager. The Plan and the Board do not provide legal, financial, or tax advice and participants in the Plan should consult a legal, financial, or tax advisor prior to purchasing a contract.

Participation in the Plan does not guarantee admission to or graduation from any college or university. Only the purchaser may direct redemptions, withdrawals, changes in beneficiary, or other contract changes. Non-residents of Texas should consider whether their home state, or the beneficiary's home state, offers 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.

You may lose money by participating in the Plan. No part of a contract is a deposit or obligation of, or is guaranteed or insured by, the Board, the state of Texas, or any agency or agent thereof. The contracts have not been registered with or approved by the SEC or any state. Purchasers should carefully consider the risks, fees, charges, and expenses associated with contracts, including Plan termination and reduced Transfer or Refund Value. Transfer Value applies to redemptions at private colleges and universities, out-of-state colleges and universities, medical and dental schools, career schools, and registered apprenticeship programs and is the lesser of: (1) the costs the units would cover at a Texas public college or university; or (2) the original purchase price of the units plus or minus net investment earnings or losses on that amount. 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 800-445-GRAD (4723), option #5. Purchasers should read all Plan documents carefully before purchasing a contract.

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