



TEXAS PREPAID HIGHER
EDUCATION TUITION BOARD

P.O. Box 13407
Austin, Texas 78711-3407

1.800.445.GRAD (4723), Option 2
FAX: 512.475.0081
texas.tomorrow@cpa.texas.gov
www.tgtp.org

TEXAS PREPAID HIGHER EDUCATION TUITION PROGRAM CHANGE OF BENEFICIARY

You may change the beneficiary as long as you meet the following criteria:

- The original beneficiary has not used any contract benefits.
- The new beneficiary is a member of the beneficiary's family and meets residency requirements (***see "Ways to prove Texas residency for the new beneficiary" below***).
- At the time the change request is submitted to the plan, the new beneficiary must be younger than 18 years of age or 18 years of age or older and enrolled in high school.
- The new beneficiary cannot have more than five years of combined Texas Guaranteed Tuition Plan contract benefits.

Ways to prove Texas residency for the new beneficiary:

- Less than one year old: birth certificate
- Ages 1-5: documentation from a child care center or provider that reflects 12 months of continuous residency, or a written statement from a parent or guardian that care is provided in the home.
- Grades K-12: report card, progress report, or transcript issued within the past 12 months.

When completing the form, please ensure the Certification of Current Purchaser and Joint Purchaser (*if applicable*) section is completed in the presence of a Notary Public. Your payment of \$50 payable to the Texas Guaranteed Tuition Plan must accompany the completed form or it will not be processed.

If you have any questions, please contact our office at (800) 445-GRAD (4723), option 2, or you can access further account information at our Website, www.tgtp.org. Thank you for participating in the Texas Guaranteed Tuition Plan.



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Change of Beneficiary

Please complete and return this form with a \$50 processing fee to P.O. Box 13407, Austin, TX 78711-3407. **This form will not be accepted via FAX.** Once we receive this information, we will substitute the new beneficiary on this prepaid tuition contract. **The form will not be processed unless accompanied by the \$50 processing fee.** Your check should be made payable to the Texas Guaranteed Tuition Plan.

Thank you for your participation in the *Texas Guaranteed Tuition Plan*. If you have any questions or need additional information, please call us at 800-445-4723, option 2.

Purchaser Name	Joint Purchaser (if applicable)
Current Beneficiary Name	
Prepaid Tuition Contract Account Number	Projected Enrollment Year

Substitute Beneficiary Information

Substitute Beneficiary Name			
Street Address			
City		State	ZIP Code
Home Phone	Social Security Number	Birthdate	Sex
Current Grade (If in K-12th)	Projected High School Graduation Year	Relationship to Original Beneficiary	Relationship to Purchaser

If there has been any usage on the above referenced contract, it cannot be transferred to a substitute beneficiary. Please attach documentation to show proof of Texas residency for the substitute beneficiary and relationship to original beneficiary and return form along with \$50 processing fee in the enclosed pre-addressed envelope.

Certification of Purchasers (Section must be completed in the presence of a Notary Public.)

I, _____, the undersigned, certify that the person named above as the substitute beneficiary is a resident of the State of Texas and is younger than 18 years of age or 18 years of age or older and enrolled in high school at the time the change request is submitted to the plan. I further certify that the substitute beneficiary is a "member of the family" of the current beneficiary and meets the 12-month Texas residency requirements.

sign
here ▶

Signature of Current Purchaser

Date

(Below section to be completed by Notary Public)

Subscribed and acknowledged before me by the said

_____, this _____ day of _____, _____.

Printed Name of Current Purchaser

(Seal)

Notary Public

I, _____, the undersigned, certify that the person named above as the substitute beneficiary is a resident of the State of Texas and is younger than 18 years of age or 18 years of age or older and enrolled in high school at the time the change request is submitted to the plan. I further certify that the substitute beneficiary is a "member of the family" of the current beneficiary and meets the 12-month Texas residency requirements.

sign
here ▶

Signature of Current Joint Purchaser (If applicable)

Date

(Below section to be completed by Notary Public)

Subscribed and acknowledged before me by the said

_____, this _____ day of _____, _____.

Printed Name of Current Joint Purchaser (If applicable)

(Seal)

Notary Public

FEDERAL PRIVACY ACT STATEMENT - Disclosure of your social security number (SSN) is required and authorized by law. Authority: 42 U.S.C. Sec. 405(c)(2)(C)(i); Internal Revenue Code of 1986, Sections 529(d) and 6109(a). The number will be used to identify the prepaid tuition contract purchaser and beneficiary when the Texas Guaranteed Tuition Plan pays benefits to the selected college or university.

You have certain rights under Chapters 552 and 559, Government Code, to review, request and correct information we have on file about you. Contact us at the address or number listed on this form.