



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 www.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 about this form, please call **1.800.445.GRAD (4723), option #3**, Monday through Friday from 8am to 6pm Central Time.

Please print clearly in all CAPITAL LETTERS using black ink. 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

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
c/o NorthStar Financial Services Group, LLC
P.O. Box 540010
Omaha, NE 68154**

This material is provided for general and educational purposes only, and is not intended to provide legal, tax nor 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. NorthStar Financial Services Group, LLC ("NorthStar") is the plan manager and the Plan is distributed by NorthStar affiliate Northern Lights Distributors, LLC and administered by NorthStar affiliate Gemini Fund Services, LLC. Non-residents of Texas should consider whether their home state, or the beneficiary's home state, offers its residents any state 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 529 plan. 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 subsidiaries or 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](#) contain 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.

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