

# Employer Authorization Payroll Deduction Form



## | INSTRUCTIONS

Please complete this form to establish payroll deductions for the LoneStar 529 Plan® for your employees. This form must be completed and submitted prior to the Plan's acceptance of contributions from any of your employees.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ✓

If you have any questions, please call us at **800-445-GRAD (4723), option #4**, Monday through Friday from 8am to 6pm Central Time. Once completed, please mail or fax this form to LoneStar 529 Plan at the following address:

LoneStar 529 Plan  
P.O. Box 405010  
Cincinnati, OH 45240  
Fax to: 402-431-4452

## 1 | EMPLOYER INFORMATION

Company name

Federal Tax ID number

Company street address

City

State

Zip

Contact person

( )

Telephone number

Title

( )

Fax number

Email address

Number of employees in company

- A. Approximate date company plans to begin payroll deduction (mm/yyyy): \_\_\_\_\_
- B. Frequency of deposits: ☐ Weekly ☐ Biweekly ☐ Monthly ☐ Quarterly ☐ Other
- C. Do you use a third-party vendor? ☐ No ☐ Yes, name of vendor: \_\_\_\_\_
- D. How do you intend to send in contributions?
- ☐ **Via check – You must send a spreadsheet of employee names, account numbers and dollar amounts with the check.**  
 Make check payable to “LoneStar 529 Plan” and mail to:  
 LoneStar 529 Plan  
 P.O. Box 405010  
 Cincinnati, OH 45240
  - ☐ **Via wire for ALL employees – Please send one consolidated contribution amount for ALL employees using the instructions below. You must send a spreadsheet of employee names, account numbers and dollar amounts.**  
 You can either fax the spreadsheet to **402-431-4452** or email the spreadsheet to [lonestar@orion.com](mailto:lonestar@orion.com).  
 Send wires as follows:  
 First National Bank  
 ABA# 104000016  
 Account Name: Texas 529 Plan  
 Account# 110427887  
 For Further Credit: *(insert Company Name)*  
 For Further Credit Account Number(s): *(insert applicable account numbers)*
  - ☐ **Via ACH for EACH employee by account number – Send an Individual ACH for EACH employee using these instructions:**  
 First National Bank  
 ABA# 104000016  
 Account# 9108369 \_\_\_\_\_  
 (Your employee's 10-digit account number)

The LoneStar 529 Plan® (“Plan”) is administered by the Texas Prepaid Higher Education Tuition Board (“Board”). Orion Advisor Solutions, Inc. (“Orion”) is the manager of the Plan, which is distributed by Northern Lights Distributors, LLC and maintained by Ultimus Fund Solutions, 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 [LoneStar529.com/Allocation-Worksheet](http://LoneStar529.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 [LoneStar529.com](http://LoneStar529.com) or calling 800-445-GRAD (4723), option 4. Investors should read the Plan Description and Savings Trust Agreement, and all other Plan documents carefully before investing.

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 529 PLAN<sup>SM</sup>