

## 2016 APPLICATION FORM



MATCH  
THE PROMISE  
FOUNDATION®

MatchThePromise.org

### THE TEXAS MATCH THE PROMISE FOUNDATION<sup>SM</sup>

encourages families to save for college by offering matching scholarships and tuition grants to participants in the Texas Tuition Promise Fund® — the state's prepaid tuition plan.

Promise Fund tuition units represent a fixed amount of undergraduate tuition and required fees at Texas public colleges and universities. Match the Promise will award Promise Fund tuition units to approved scholarship recipients, supplementing participant contributions to the fund during the current Promise Fund sales period.

#### Matching Scholarship *up to \$1,000*

Up to \$500 of participant tuition unit purchases will be matched with the same type of tuition units for up to 150 top scoring applicants. Scholarship recipients with a family income of \$75,000 or less will receive a two-to-one match. All other scholarship recipients will receive a one-to-one match.

#### Promise Scholarship *of \$2,000*

A one-time grant of tuition units worth \$2,000 at today's prices will be awarded to the five applicants who score the highest.

The Texas Match the Promise Foundation will accept applications postmarked **Sept. 1 through Dec. 31, 2016**.  
(Families can also enroll in the Promise Fund during this time if they have not already done so.)

### ELIGIBILITY CRITERIA

Applicants must meet the following criteria to apply for the Match the Promise scholarship program.

- Have a Texas Tuition Promise Fund account
- Be a Texas resident and a dependent for tax purposes of a Texas resident
- Be a student in grade five through nine
- Have a family income of \$100,000 or less

Students must write an essay about a career that interests them and submit the essay with this application.

Applications will be scored by assigning points to career essays, grade averages, family income levels and numbers of dependents.

### EASY STEPS TO APPLY

Read the Description and Application Instructions for details about the program, contribution requirement and application process.

1. Fill out Pages 2-3 of this application, and read and sign Pages 4-6 (also Page 7 if applicable).
2. Include your child's career essay and a copy of your child's report card or transcript for the entire 2015-2016 school year.
3. Review the checklist on Page 8 to ensure the application is complete, and mail the application and supporting documentation to the address shown.

You can download this application online, and view the [Description and Application Instructions](#) and [Student Career Essay Instructions](#), at [www.MatchThePromise.org](http://www.MatchThePromise.org).





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Provide the following information to apply for a scholarship from the **TEXAS MATCH THE PROMISE FOUNDATION<sup>SM</sup>**.

Respond to each item on the application.  
If an item is not applicable, enter "N/A" as your response.

For Match the Promise assistance, call 1-800-531-5441, ext. 3-7570, or visit [www.MatchThePromise.org](http://www.MatchThePromise.org).  
(For Texas Tuition Promise Fund assistance, call 1-800-445-4723, opt. 5, or visit [www.texas tuition promise fund.com](http://www.texas tuition promise fund.com).)

## STUDENT

1. Provide the information below for the child on whose behalf you are submitting this application.

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
(include both mailing and physical addresses if different)

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Current Grade:     5     6     7     8     9

## PARENT OR GUARDIAN

2. Provide the information below for yourself.

*A parent or legal guardian who claimed the child as a dependent on his or her 2015 federal income tax return must submit this application since the scholarship awards are contingent on income verification. **If this applicant also owns the child's Texas Tuition Promise Fund account, you do not need to fill out Page 7 of the application.***

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
(include both mailing and physical addresses if different)

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_ Email: \_\_\_\_\_

Relationship to Student:     Mother     Father     Guardian     Other, please specify: \_\_\_\_\_

## MATCH THE PROMISE

3. Has your child previously received a Match the Promise scholarship or grant? (This is for informational purposes only.)

Yes     No

4. How did you learn about the Match the Promise program?

TV/Radio Interview     News Article     Email     Facebook     Twitter     Event     Family, Friend or Colleague

Website/Internet     Other, please specify: \_\_\_\_\_





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## TEXAS MATCH THE PROMISE FOUNDATION<sup>SM</sup>

### TEXAS TUITION PROMISE FUND

5. Provide the Texas Tuition Promise Fund account number that is in your child's name and you would like linked to his/her scholarship or grant if approved. This is the account that will be used to determine if the minimum contribution requirement of the Match the Promise program is met.

*Please provide only one account number.*

Account Number

Account Owner/Purchaser

#### Promise Fund Account Types:

- If your child's Promise Fund account is a **lump sum plan**, this account will automatically be relabeled as a pay-as-you-go account so that you can make additional tuition unit purchases as needed with the same account number.
- If your child's Promise Fund account is an **installment plan** that is **not paid in full**, you can use this account to meet the minimum contribution requirement.
- If your child's Promise Fund account is an **installment plan** that is **paid in full**, you will need to **open a new account** to make additional tuition unit purchases as needed. Please indicate the new account number above if applicable.

### FAMILY INCOME

6. Indicate the adjusted gross income shown on the federal income tax return you filed for 2015. If you were married but filed separately, indicate the adjusted gross income shown on the income tax returns for both spouses.

\$ \_\_\_\_\_ must be \$100,000 or less

7. Indicate the number of dependents that you claimed on your 2015 federal income tax return.

# \_\_\_\_\_ do not include yourself or your spouse

*Be sure to indicate the adjusted gross income and number of dependents actually shown on your 2015 federal income tax return since application scores are based, in part, on these numbers. If your child is approved for a scholarship or grant, you will be asked to submit a copy of your 2015 tax return. **Do not send the tax return with your application.***

### REQUIRED DOCUMENTATION

8. You must submit your child's career essay and a copy of your child's report card or transcript for the **entire** 2015-2016 school year (last school year) with this application. The documentation will not be returned to you.

Place a check to indicate you have included these items:     Career Essay     2015-2016 School Report Card or Transcript

Please read the next page.





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Please read this page and provide the requested signatures on the next page.  
This consent form allows the Foundation to use your child's career essay in promotional efforts for the scholarship program.

### PARTICIPATION CONSENT, LIABILITY RELEASE AND INDEMNITY AGREEMENT

*Child:*

The child on whose behalf you are submitting this application ("Child").

*Releasees:*

The Texas Match the Promise Foundation, a 501(c)(3) federal tax-exempt public charity, the Texas Prepaid Higher Education Tuition Board, an agency of the state of Texas, and the Texas Comptroller of Public Accounts, an agency of the state of Texas, legitimate news organizations and all contractors, consultants, officers, board members, directors, employees, volunteers, agents and representatives of these entities ("Releasees").

*Agreement:*

In consideration for the Releasees facilitating my Child's participation, I agree on my behalf and on my Child's behalf to the terms of this Participation Consent, Liability Release and Indemnity Agreement ("Agreement").

*Grant and Consent:*

I irrevocably grant the absolute, unrestricted and unlimited license, right, permission and consent to photograph, videotape, copyright, broadcast, reproduce, telecast, webcast, cablecast, use on the internet, publish, distribute or otherwise use in any format and in any media, Child's name, photograph, likeness, voice, grade, school, city, career essay and career video, including third-party mentions, my Child's choice of career and my Child's receipt of any matching scholarship or tuition grant, with or without my name, my Child's name or a fictitious name, and with or without any statements or testimonials made or authorized by me or my Child, (collectively, "Authorized Materials") to promote the Match the Promise program, the Texas Unclaimed Property program, from which donations to the Foundation are received, and Texas 529 plans (collectively, "Authorized Use"). I know that my Child and I will not receive any payment or benefit for Authorized Use of Authorized Materials. I waive the right to inspect or approve any materials incorporating Authorized Materials, and I waive any claim to any intangible rights, including the right of publicity or copyright, that I or my Child may hold in any medium of expression incorporating Authorized Materials created or used by Releasees.

*Release and Indemnity:*

I expressly release and agree to indemnify Releasees from and against any and all claims, liabilities, causes of action, losses, expenses and all other amounts, of every kind, known or unknown, resulting from or connected with Authorized Use of Authorized Materials or my Child's participation in the creation of Authorized Materials, including invasion of privacy, defamation, violation of any right of publicity, violation of any statutory right, personal injury or illness, property damage or any other claims, including those caused or alleged to be caused in whole or in part by the negligence of Releasees (collectively, "Claims"). I fully understand that Releasees will not indemnify or reimburse me or my Child or any other person or entity for any amount for any reason under this Agreement, and that any provisions or construction of this statement to the contrary are null and void. If, despite this release, I, my Child or anyone on behalf of me or my Child makes a claim against Releasees, my agreement to indemnify Releasees includes indemnifying Releasees from any and all Claims that are brought by, or on behalf of, me or my Child and are in any way connected with Authorized Use of Authorized Materials.

*Certification:*

I certify that I have read this Agreement and fully understand its terms and conditions, and that this Agreement is governed by Texas law and shall be performed in Travis County, Texas, and that if any portion of this Agreement is found to be void or unenforceable, the remaining portions will remain in full force and effect. I certify that I voluntarily sign, and have authority to sign, this Agreement.

(continued on the next page)



Texas Comptroller of Public Accounts



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(cont.)

## PARTICIPATION CONSENT, LIABILITY RELEASE AND INDEMNITY AGREEMENT

### Signatures:

This Agreement must be signed by the Child, both of the Child's parents and anyone else included in the career essay, even if not mentioned by name (for instance, if the Child mentioned a teacher who has been an inspiration to them).

#### Child

I consent to the disclosure of information about me, and I agree to the foregoing.

Signature of Child: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of Child: \_\_\_\_\_

#### Parents/Guardians

I am the parent or legal guardian of the Child, and I agree to the foregoing on my own behalf and on behalf of my Child.

*Both parents must sign below or you must note N/A on the second signature line if you are the minor's only parent.*

Signature of Parent/Guardian: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of Parent/Guardian: \_\_\_\_\_

Signature of Parent/Guardian: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of Parent/Guardian: \_\_\_\_\_

#### Third-Party Mentions (anyone other than parents/guardians mentioned in the career essay, even if not mentioned by name)

I represent that I am included in the Child's career essay, and I agree to the foregoing on my own behalf.

*Please add additional signature lines and names if needed.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Mention in Essay\*: \_\_\_\_\_

\*Please note how you were mentioned (for instance, if the Child mentioned you as their third-grade teacher).

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Mention in Essay\*: \_\_\_\_\_

\*Please note how you were mentioned (for instance, if the Child mentioned you as their third-grade teacher).

See the Application Certification on the next page.





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Please read and sign this page.

## APPLICATION CERTIFICATION

By signing below, I certify that:

- I have read, understand and agree to the Matching Scholarship and Tuition Grant Description and Application Instructions, including terms regarding scholarships, grants and tuition units.
- My child is eligible for the Match the Promise program based on residency, grade level and family income.
- My child is enrolled in the Texas Tuition Promise Fund. I understand I must be a U.S. citizen or legal resident alien to open a Promise Fund account.
- I authorize the Texas Match the Promise Foundation to act on my behalf in contacting the Texas Tuition Promise Fund to verify the information in this application, verify my Promise Fund contributions and link any scholarship account to the Promise Fund account I identified in this application.
- If my Promise Fund account is a lump sum plan, I acknowledge that it will be re-labeled as “pay-as-you-go” to allow for additional tuition unit purchases with the same account number, in accordance with scholarship program terms.
- If my child is approved for a scholarship or grant, I understand I must submit income verification no later than May 1, 2017, and the documents I submit must prove that I meet the income requirements of the Match the Promise program, for my child to receive the scholarship or grant.
- If my child is approved for a scholarship or grant, I agree to contribute at least \$100 to the linked Promise Fund account during the current Promise Fund sales period (Sept. 1, 2016 – Aug. 31, 2017). I understand all contributions must be made by Promise Fund plan due dates.
- I understand the Foundation owns and controls the scholarship account and any applicable earnings.
- I have read, understand and agree to the terms and conditions of the Promise Fund Plan Description and Master Agreement and agree that it will govern the scholarship account, except as shown differently in the Matching Scholarship and Tuition Grant Description and Application Instructions.
- I consent to and authorize the use of my private data as described in the Matching Scholarship and Tuition Grant Description and Application Instructions. If I am submitting private data belonging to another individual, I confirm that I am providing such private data with the full knowledge and permission of that individual.
- The information I have provided is true, complete and accurate. I understand the scholarship account will be forfeited if I provide false or misleading information on this application or supporting documentation, or on the Promise Fund application.
- I understand this application will not be considered for the Match the Promise program if it is not postmarked between Sept. 1 and Dec. 31, 2016, if the application is not complete or appropriately signed in all places, or if the career essay and a copy of the school report card or transcript are not enclosed. I understand that if I am **not the owner** of the Promise Fund account shown on Page 3, both the account owner and I must complete Page 7 or my application will not be processed.

Signature of Parent/Guardian: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name of Parent/Guardian: \_\_\_\_\_

If you are **the owner (purchaser)** of the Promise Fund account identified in this application, **skip to Page 8** to ensure your application is complete.  
If you are **not the owner**, **go to Page 7**.



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If you are **the owner (purchaser)** of the Promise Fund account identified in this application, **skip to Page 8** to ensure your application is complete.  
If you are **not the owner**, please sign the upper portion of this page, and have the account owner sign the lower portion.

### PARENT/GUARDIAN NON-PURCHASER CERTIFICATION

By signing below, I certify that:

- **I am the parent or guardian** filling out this application.
- **I am not the owner (purchaser)** of the Texas Tuition Promise Fund account designated in this application.
- I understand the owner of the Promise Fund account designated in this application will own any contributions made to that account.
- I understand the account owner can take actions with the designated Promise Fund account that could result in my child losing some or all of their scholarship or grant, including making non-qualified withdrawals from the account, closing it or changing the beneficiary.
- I understand only the account owner is authorized to request information from the Promise Fund program about the designated Promise Fund account and scholarship account. The account owner will receive annual statements and can obtain information by calling the Promise Fund program or by accessing the Promise Fund website.
- I understand only the account owner can authorize redemption of tuition units for the designated Promise Fund account and scholarship account when my child is ready for college.

Signature of Parent/Guardian: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name of Parent/Guardian: \_\_\_\_\_

### ACCOUNT OWNER PURCHASER CERTIFICATION

By signing below, I certify that:

- **I am not the parent or guardian** filling out this application.
- **I am the owner (purchaser)** of the Texas Tuition Promise Fund account designated in this application.
- I understand the beneficiary of the Promise Fund account designated in this application is applying to participate in the Match the Promise program.
- I authorize the Texas Match the Promise Foundation to act on my behalf in contacting the Texas Tuition Promise Fund to verify Promise Fund participation and contributions and link any scholarship account to the designated Promise Fund account.
- I authorize the Foundation to provide information about the scholarship account, and about Promise Fund contributions and actions that affect the scholarship account, to the beneficiary's parent or guardian noted above.
- I acknowledge that certain actions I take with the designated Promise Fund account could result in the beneficiary losing some or all of their scholarship or grant, including making non-qualified withdrawals from the account, closing it or changing the beneficiary.
- If the designated Promise Fund account is a lump sum plan, I acknowledge that it will be re-labeled as "pay-as-you-go" to allow for additional tuition unit purchases with the same account number, in accordance with scholarship program terms.

Signature of Account Owner/Purchaser: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name of Account Owner/Purchaser: \_\_\_\_\_





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#### Have Questions?

For Match the Promise assistance, call 1-800-531-5441, ext. 3-7570, or visit [www.MatchThePromise.org](http://www.MatchThePromise.org).  
(For Texas Tuition Promise Fund assistance, call 1-800-445-4723, opt. 5, or visit [www.texastuitionpromisefund.com](http://www.texastuitionpromisefund.com).)

### CHECKLIST

Thank you for your interest in the Match the Promise program. Please review the checklist on this page to ensure your application is complete. This checklist is for your convenience only; you do not need to return it.

- Read the Description and Application Instructions for details about the program, contribution requirement and application process.
- Fill out Pages 2-3 of the application.
- Read and sign Pages 4-6. If you are not the owner (purchaser) of the Promise Fund account identified in the application, both you and the account owner must sign Page 7.
- Include your child's career essay.
- Include a copy of your child's report card or transcript for the entire 2015-2016 school year (last school year).
- Mail the application and supporting documentation to the following address.  
**Match the Promise Foundation**  
**Texas Comptroller of Public Accounts**  
**111 E. 17th St. / P.O. Box 13232**  
**Austin, Texas 78711-3232**
- Make sure your application is postmarked between Sept. 1 and Dec. 31, 2016.
- If your child is approved for a scholarship or grant, make a contribution of at least \$100 to the linked Promise Fund account between Sept. 1, 2016, and Aug. 31, 2017.

Contributions should continue to go to the Promise Fund program. Please do not send contributions to the Foundation.

The information you provide is confidential by law. Under Ch. 559, Government Code, you are entitled to review, request and correct information we have on file about you, with limited exceptions in accordance with Ch. 552, Government Code. To request information or error correction, contact us at the address or number listed on this form.

