

Louisiana's STARTK12 Saving Program Legal Entity's Account Application

If you need assistance completing this form, call 1-800-259-5626

Instructions: A Legal Entity may be an Account Owner and open an account for a named Beneficiary, however, deposits made by the Legal Entity cannot be refunded to the Legal Entity. If you are the authorized agent of a corporation, partnership, unincorporated association, limited liability company, trust or other legal entity, complete all sections. **Type or print in ink.**

Section A: TO BE COMPLETED BY THE AUTHORIZED AGENT OF THE LEGAL ENTITY THAT IS THE ACCOUNT OWNER

1. Name of the Legal Entity (Account Owner)

2. Legal Entity's Federal Employer Identification Number (EIN)

3. Legal Entity's Louisiana Revenue Account Number:

4. Name of the Agent Authorized to Act on Behalf of the Legal Entity (Account Owner)

Last Name

First Name

MI

Suffix

5. Agent's Telephone Number

6. Agent's E-mail Address:

7. Authorized Agent's Mailing Address: Number and Street (including Suite Number)

City

State

Zip Code

8. To be an Account Owner, the Legal Entity must meet one of the following (check the one that applies)

- Established, organized or incorporated in accordance with the laws of Louisiana (Examples: trusts, estates, groups, associations, organizations, partnerships and cooperations).
- Established, organized and incorporated in accordance with the laws of a state other than Louisiana or a county outside the United States AND registered with the Louisiana Secretary of State to conduct business in Louisiana AND has physical place of business in Louisiana (Examples: trusts, estates, groups, associations, organizations, partnerships and corporations).
- A government agency

Section B: DESIGNATE A BENEFICIARY: Complete the following about the student who will receive benefits from the account

9. Last Name:

First Name:

MI

Suffix

10. Social Security Number

11. Date of Birth (Month/Day/Year)

12. Sex:

Male

Female

13. Mailing Address: Number and Street (including Apartment Number)

City

State

Zip Code

14. U.S. Citizen or Permanent resident?

Yes No

15. The Beneficiary is a permanent resident of what State?

Parish/County

Section C: SELECT A LOUISIANA SECONDARY INSTITUTION: Identify the school the Beneficiary is attending or most likely to attend.

16. Name of School:

City

Section D: SELECT A METHOD OF MAKING DEPOSITS: Do not remit a deposit until you receive written notification that the account has been approved. Mark all options that may apply.

17. Automatic Bank Debits Direct Payments Payroll Deduction

If you have chosen the Direct Payments Option, deposits should be mailed to STARTK12 Saving Program, PO Box 91000, Baton Rouge, LA 70821-9000, If you have chosen Automatic Bank Debits or Payroll Deduction, complete the appropriate form. The forms may be completed online or obtained by calling 1-800-259-5626.

Section G: SELECT INVESTMENT FUNDS: Investment funds and applicable fees are fully explained in the STARTK12 Disclosure Booklet, available upon request from the STARTK12 Program or on the website at www.startsaving.la.gov. You must thoroughly review the STARTK12 Disclosure Booklet prior to selecting your investment fund. You must select a fund. Failure to do so will cause delays in opening the STARTK12 account and the STARTK12 account could potentially not be opened. In accordance with federal regulations, the investment fund(s) for future deposits may be selected at the time of deposit, but the investment fund(s) for monies in an existing account may be changed twice per calendar year. Choose the fund(s) in which your deposits will be placed. If more than one fund is selected, indicate the percentage of the deposit for each fund. The percentage must be a whole number (examples: 10, 15, 25, etc.) and the total percentage for all funds must be 100%.

22. Investment Funds:

Vanguard Federal Money Market Fund (Equity) (VMFXX)	_____ %
Vanguard Short-Term Bond Index Fund (Admiral Shares) (Equity) (VBIRX)	_____ %
Vanguard Intermediate-Term Bond Index Fund (Admiral Shares) (Equity) (VBILX)	_____ %
Vanguard Institutional Total Stock Market Index Fund (Institutional Plus Shares) (Equity) (VITPX)	_____ %
Vanguard Total International Stock Index Fund (Institutional Shares) (Equity) (VTSNX)	_____ %
Total	_____ %
	(Must equal 100%)

Section F: GOVERNING LAWS, NOTICES AND ACCOUNT OWNER'S CERTIFICATION

On behalf of the Account Owner, I, the undersigned Authorized Agent of the Account Owner, do hereby state, acknowledge and certify the following:

The terms of the Participation Agreement will be interpreted in accordance with applicable federal and state law and the Louisiana Tuition Trust Authority (LATTA) rules and regulations. If any provision of this Agreement is determined to be unenforceable, the remaining provisions shall remain in full force and effect. The Account Owner agrees to be bound by the statutes, regulations and rules governing the STARTK12 Saving Program and the terms and conditions incorporated into the Participation Agreement.

The Account Owner understands and agrees that: The person identified as its authorized agent in Section A is fully authorized to act on its behalf for all purposes related to this STARTK12 Saving Program Account; funds deposited in this STARTK12 Savings Program Account cannot be refunded to the Account Owner under any circumstances; if the funds are not used to meet the Qualified Education Expenses of the Beneficiary, there may be tax consequences; the assets of the LATTA reserved for payment of the obligations of the LATTA pursuant to the Participation Agreement shall be placed in the Louisiana Tuition and Savings Fund (the "Fund"); any claim filed by an Account Owner against the LATTA pursuant to the Participation Agreement for disbursement of funds invested in the Louisiana Principal Protection Fund shall be made solely against the assets of the Fund; any claim filed by an Account Owner against the LATTA pursuant to the Participation Agreement for disbursement of funds invested in equities shall be solely against the Current Value of such accounts and not against the Fund; no Account Owner or Beneficiary of an Education Savings Account shall have any claim against the State General Fund or other funds or revenues of the State of Louisiana, or against the funds of any secondary education institution; the LATTA does not guarantee any investment in equities; the LATTA reserves the right to amend the rules regulating the STARTK12 Saving Program in accordance with the Louisiana Administrative Procedure Act; any amendments to applicable state or federal statutes and/or regulations shall automatically amend the terms and conditions of the Participation Agreement; and any notice required to be given to the Account Owner or Beneficiary will be effective if mailed by first class mail to the latest address provided to LATTA by the Account Owner's Agent.

The Account Owner has read and understands the terms and conditions of the Participation Agreement and the START Disclosure Booklet. The Account Owner authorizes the LATTA to release information pertaining to this Agreement but only to those agencies or individuals that the LATTA determines to be essential to effectuate the purpose of the Agreement.

I certify that I am the duly appointed Agent authorized to act on behalf of the Account Owner named in Section A, that I am of full legal age and that the information I have provided in this Application is true, complete and correct to the best of my knowledge and belief and is made in good faith. I certify and acknowledge that the LATTA will open a STARTK12 Saving Program Account based on the information I have provided in this Application, and hereby agree to defend, indemnify, save and hold harmless the LATTA, its members, employees, agents and affiliates from any and all loss, claim, liability, cost, damage or expense ongoing out of any untrue, inaccurate or otherwise misleading information provided herein.

Authorized Agent: _____ **Authorized Agent:** _____ **Date:** _____
 (Print Name) (Signature)

OFFICE USE ONLY: Account Number Assigned _____ Date: _____