FRANKLIN TEMPLETON

Franklin Templeton 529 College Savings Plan

Incoming Rollover Form

Please read the Franklin Templeton 529 College Savings Plan Program Description for complete Rollover information before completing this form.

- Your rollover proceeds will be invested according to the allocation instructions on your Account. For new Accounts, the Plan will follow the allocation instructions on the application you submit with this form.
- Complete a separate form for each Account and submit a new **Account Application** along with this form, unless you already have a Franklin Templeton 529 College Savings Plan Account for this Beneficiary.
- Complete all sections in blue or black ink and print in capital letters. Be sure to sign and date this form. A Medallion Signature Guarantee may be required as described in **Section 5**.

To request assistance in completing this form call us at **(866) 362-1597**, Monday to Friday 8:30 a.m. - 8 p.m. ET.

529	College	Savings	Plan

(866) 362-1597

Monday to Friday 8:30 a.m. - 8 p.m. ET

Franklintempleton.com

Regular mailing address:

Franklin Templeton 529 College Savings Plan PO BOX 55961

Boston, MA 02205

Overnight mailing address:

Franklin Templeton 529 College Savings Plan 95 Wells Ave Suite 160 Newton, MA 02459

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3. Current 529 Program Manager or ESA Custodian (Financial Institution)

plan's Program Manager or ESA Custodian for proper mailing address.	Account. Please contact your current Section 529
 If you do not provide a breakdown from your current 529 Plan Manager or ESA Custoc portion with your rollover check, the entire amount may be treated as earnings that m 	,
Account Number of 529 Plan or ESA	
Name of Current 529 Plan Manager or ESA Custodian (Usually a Financial Institution)	
Address of Current 529 Plan Manager or ESA Custodian	
City State	Zip Code
Contact Person Telephone	a Number
Check this box if the Beneficiary on this account differs from the Beneficiary indicated in S	
Instructions to Current 529 Program Manager or ESA Custodian	
The assets described below must all be held by the Financial Institution indicated in Sec	etion 3 Your rollover proceeds will be invested
according to the standing allocation instructions on file at the time the assets are received they will be invested according to what you choose on the Account Application .	
Check one.	
A. Roll over all of the assets in my current 529 Plan or ESA account to my Fra	
(To list more than two current accounts, use a separate sheet.)	nklin Templeton 529 College Savings Plan.
(To list more than two current accounts, use a separate sheet.) Account Number	stimated Account Value
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• The account from which you are moving assets must have the same Account Owner name as well as Social Security number or

SIGNATURE — YOU MUST SIGN BELOW

By signing below, I certify that the information contained in this form, and in any required documentation, is true, complete and correct.

- I certify that I have read and understand, consent, and agree to all of the terms and conditions of the Franklin Templeton 529 College Savings Plan Program Description, and understand the rules and regulations governing rollover contributions from other 529 programs and ESAs.
- I understand that for rollovers from Section 529 programs only one such rollover for the same Beneficiary is permitted in any 12-month period.
- Please call the Franklin Templeton 529 College Savings Plan at (866) 362-1597 if you have any questions concerning this process.

SIGNATURE	
Signature of Account Owner	Date (mm-dd-yyyy)

Medallion Signature Guarantee — IF APPLICABLE

Important Information. Your current 529 program may require a medallion signature guarantee on this form and it may have additional requirements before releasing your funds. To avoid delays in processing your rollover, contact your current 529 program for instructions before mailing this form to the Franklin Templeton 529 College Savings Plan. You may be required to provide proof to your bank or broker of your authority to act on behalf of the account(s) you are rolling over before a medallion signature guarantee will be provided.

- You must provide the following information as underwritten certification that your signature is genuine.
- You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution.

 A notary public cannot provide a Medallion Signature Guarantee, nor can you guarantee your own signature.
- Do not sign below until you are in the presence of the authorized officer providing the Medallion Signature Guarantee.
- The lack of a required Medallion Signature Guaranteee could delay this rollover.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the Franklin Templeton 529 College Savings Plan Program Description.

SIGNATURE	
Signature of Account Owner (In the presence of the authorized officer.)	Authorized Officer to place stamp here
SIGNATURE	
Signature of Guarantor	
Title	
Name of Institution	
Date (mm-dd-ywy)	

6. Authorization and acceptance (No Account Owner action is necessary in this section.)

Franklin Templeton 529 College Savings Plan hereby agrees to accept the rollover described herein and upon receipt will deposit the proceeds in the Account established on behalf of the Account Owner named herein.



INSTRUCTIONS TO CURRENT SECTION 529 PLAN PROGRAM MANAGER OR ESA CUSTODIAN

Send redemption proceeds by check to **Franklin Templeton 529 College Savings Plan, PO BOX 55961, Boston, MA 02205**. Make the check payable to Franklin Templeton 529 College Savings Plan. Include the Account Owner name and the Franklin Templeton 529 College Savings Plan Account number *(if provided)* on the check and enclose a statement that shows the principal and earnings of the amount being rolled over to the Franklin Templeton 529 College Savings Plan Account.