## FRANKLIN TEMPLETON

Franklin Templeton 529 College Savings Plan

## **Transfer Form**

**529 College Savings Plan** 

## Instructions

- Please read the Franklin Templeton 529 College Savings Plan Program
   Description before changing the Account Owner and/or Beneficiary on a Plan
   Account. You may also wish to consult with your financial professional, legal
   and/or tax advisor before completing this form.
- If a change of Account Owner or Beneficiary is requested, and requires a
  new Account that does not yet exist, the new Account Application can be
  found online, or by calling the Plan to obtain a paper version of the Account
  Application, to submit along with this Transfer Form.
- A new account number will be assigned to the Account opened for the new Account Owner and/or Beneficiary, unless an Account already exists for that Account Owner/Beneficiary and the existing number is provided below.
- A Notary is required in **Section 4** for changes of Account Owner for existing accounts. (If using this form to transfer a UTMA/UGMA to a former Minor, a Notary is not required).

(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

Print in capital letters using blue or black ink, sign and date the form and mail it to the Plan at the above address.

Important: To avoid adverse tax consequences on the Account transfer, the new Beneficiary must be a Member of the Family of the former Beneficiary, as defined in the Franklin Templeton 529 College Savings Plan Program Description, and as described in Section 529 of the Internal Revenue Code. If the new Beneficiary is not a Member of the Family of the prior Beneficiary, the change will be considered a Non-Qualified Withdrawal, which means that it may cause the Account to be subject to both state and federal income tax and an additional 10% federal penalty tax on any Account earnings at the time of the Beneficiary change. A change of Beneficiary is not permissible for custodial accounts opened under the Uniform Gifts to Minors Act (UGMA) or Uniform Transfers to Minors Act (UTMA).

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

ransfer Instructions		
Change of Account Owner (Same Beneficiary)	Change of Account Owner and Change of Beneficiary (Different Account Owner and Different Beneficiary)  Change of Beneficiary (Same Account Owner)	
1. Current Account Information		
Account Number (Required)	— Account Owner Social Security Number (Last four digits <b>Required</b> )	
Account Owner (First name) (Required)		И.І.
Account Owner (Last name) (Required)		_
Beneficiary (First name) (Required)		И.І.
Beneficiary (Last name) (Required)		
Beneficiary Social Security Number (Last four di	gits <b>Required</b> )  Telephone Number	



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## 4. SIGNATURE AND AUTHORIZATION (THIS SECTION MUST BE SIGNED FOR THIS CHANGE TO TAKE EFFECT.)

By signing this form, I authorize the transfer of all or the designated portion of my Account to another Account with a different Account Owner and/or Beneficiary as indicated on this form. I acknowledge the following:

- I certify that all of the information provided by me on this form is true, complete and correct.
- If changing the Account Owner, the new Account Owner is submitting an **Account Application** along with this form, unless he/she
  already maintains an Account in the Franklin Templeton 529 College Savings Plan for the Beneficiary and I have provided the existing
  account number in **Section 2**.
- If changing the Beneficiary without changing the Account Owner, I make and agree to the same representations, warranties, and agreements for my new Beneficiary as were stated in the original Account Application for my current Beneficiary and I certify that the new Beneficiary is a "member of the family" of the current Beneficiary, as defined in Section 529 of the Internal Revenue Code and the Program Description.
- If I am participating in Recurring Contributions, I understand that my participation in Recurring Contributions will be canceled only
  if I transfer my entire Account balance to another Account for a new Account Owner and/or Beneficiary; otherwise my Recurring
  Contributions will continue in my original Account unless an **Account Features Form** accompanies this form.
- If I am making contributions by payroll direct deposit, I understand that my payroll contributions will continue in my original Account, regardless of the amount transferred, unless I notify my employer that I want to stop or change the amount of my payroll direct deposit.
- If I am transferring my entire account balance to another Account Owner, I request the closure of my original Account.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner.

If requesting a change of ownership, do not sign below until you are in the presence of the authorized notary providing the notary service.

Signature of Account Owner Date (mm-dd-yyyy) Notarization - REQUIRED FOR CHANGES TO THE ACCOUNT OWNER OF AN EXISTING ACCOUNT (Please note: notarization is not required if the Account Owner change is related to an UTMA/UGMA account where the Beneficiary has reached the age of majority). Your signature must be notarized. See below. Before me, a Notary in and for this document was State acknowledged before me on who certifies the Full Date Current Account Owner correctness of the signature above. Date (mm-dd-yyyy) Signature of Notary Name of Notary (first, middle initial, last) My commission expires: **Authorized Officer to place stamp here** Date (mm-dd-yyyy)