



529 COLLEGE SAVINGS PLAN
AUTOMATIC INVESTMENT PLAN FORM

Complete this form to establish or change an automatic investment plan from your bank account into an existing Franklin Templeton 529 College Savings Plan account.

If completing by hand, please print clearly in CAPITAL LETTERS, using blue or black ink.

This request is related to Franklin Templeton case number(s):

1 ACCOUNT INFORMATION

Account Owner first name M.I. Last name Suffix

Email address Account Owner SSN/TIN

Primary phone number

2 AUTOMATIC INVESTMENT PLAN

Complete this section to establish an automatic investment plan directly FROM a bank account TO your Franklin Templeton 529 College Savings Plan portfolio(s).

- Franklin Templeton may take up to 15 days to establish your automatic investment. \$25 investment minimum per portfolio.
If Frequency and Investment Date are not selected, transfers will be made monthly on the 20th.
If the Investment Date falls on a non-business day, the transaction will be made on the following business day.
If you select bi-monthly as the frequency, the selected dates must be at least 10 days apart.

Select ONE of the following:

Apply to all portfolio(s) listed under the SSN/TIN provided in Section 1. \$ per portfolio.
Specify your start month, frequency and investment date below:

START MONTH FREQUENCY (select one) INVESTMENT DATE
monthly quarterly 1st 10th 20th
bi-monthly annually 5th 15th 25th

OR
Specify a different start month, investment date(s) or frequency for only the portfolio(s) listed below.

Table with 6 columns: SHARE CLASS, PORTFOLIO NAME/NUMBER / ACCOUNT NUMBER, AMOUNT, START MONTH, FREQUENCY (select one), INVESTMENT DATE. Contains 5 rows for portfolio selection.

1. If you currently receive any electronic communications/documents from Franklin Templeton, future communications/documents will be sent to the email address provided on this form, replacing any prior email address on file.

- Any bank account owner who is not an owner of the Franklin Templeton 529 College Savings Plan account may need to sign in Section 4.
- No checks? Attach a preprinted savings account deposit slip or letter from your bank, on its letterhead and signed by an officer. The deposit slip or letter must include the bank account registration, account number, account type, and bank routing number. Do not staple to the application. Handwritten information on the savings deposit slip or bank letterhead is not acceptable.

These bank instructions will be established for purchases, automatic investment plan transfers, and distributions.

Select one of the following options:

- Use my attached, preprinted voided check.
- Use my attached, preprinted checking deposit slip.
- Use my attached, preprinted savings deposit slip.
- Use my enclosed personal investment check. (If more than one investment check is enclosed, please provide the appropriate bank information below.)

Bank routing number (9 digits)

Bank account number

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IMPORTANT: Distribution requests to send proceeds electronically within 15 days of establishing or changing bank instructions must be submitted by completing a 529 Withdrawal form, signature guaranteed by a bank, savings and loan association, trust company, credit union, broker-dealer or any other "eligible guarantor institution" as defined under the rules adopted by the Securities and Exchange Commission, otherwise proceeds will be sent by check to your address of record.

J. A. Sample 123 Street Anywhere, USA 00000	 Name must be preprinted and unaltered.	XXXXX
DATE _____		
PAY TO THE ORDER OF: _____	Tape your preprinted voided check here or a preprinted deposit slip for savings account.	<input style="width: 100%; height: 20px;" type="text"/>
		DOLLARS
FOR _____		
12100123 XXXXX 9876543210		

Certain capitalized terms herein are used as defined for purposes of the current *Investor Handbook*, which contains a description of the Franklin Templeton 529 College Savings Plan, including information about actions taken by this form.

BY SIGNING IN SECTION 4 I CERTIFY AND AGREE THAT:

- I understand that this plan is offered and administered by the New Jersey Higher Education Student Assistance Authority (HESAA) and managed and distributed by Franklin Templeton Distributors, Inc., an affiliate of Franklin Resources, Inc., which operates as Franklin Templeton. No federal or state guarantee. Principal value may be lost and investing in the plan does not guarantee admission to college or sufficient funds for college. Please refer to the *Investor Handbook* for more complete information.
- I authorize Franklin Templeton Distributors, Inc., or its designee ("Distributors"), its agents, and their affiliates, to act on instructions believed to be genuine and from me for the service authorized on this form. The Automatic Investment Plan is subject to conditions set forth in the *Investor Handbook*.
- By completing Section 2 on this form, I authorize Distributors to make electronic debits to the Bank Account identified in Section 3 and on the enclosed voided check or savings account deposit slip, when instructed to do so by me or by my financial advisor, whether online, electronically, by telephone or otherwise (and to make, if necessary, adjusting transfers if any amounts are transferred in error).
- I certify that I am an owner of the bank account identified on this form and that my signature alone is sufficient to authorize. Distributors may correct any transaction error with a debit or credit to my financial institution account and/or Franklin Templeton 529 College Savings Plan account. This authorization, including any credit or debit entries initiated thereunder, is in full force and effect until I notify Distributors of its revocation by telephone or in writing and they have had sufficient time to act on it.
- I agree that Franklin Templeton may make additional attempts to debit/credit the Bank Account if the initial attempt fails, and if a transfer is denied by the bank for any reason, Franklin Templeton will discontinue this authorization.
- I understand that digital communication channels are not necessarily secure. If I do choose to send confidential or sensitive information to you via digital communication channels (e.g. email, chat, text messaging, fax), I am accepting the associated risks related to potential lack of security, such as the possibility that my confidential or sensitive information may be intercepted/accessed by a third party and subsequently used or sold.

Signature Requirements:

- Signature of Franklin Templeton 529 College Savings Plan Account Owner is always required.
- If you are establishing banking information refer to the chart below for signature requirements.

Is there at least one common owner between the Franklin Templeton 529 College Savings Plan Account Owner and bank account owner(s)?	Signature Requirement
No common owner	Notarized signature from Franklin Templeton 529 College Savings Plan Account Owner and bank account owner(s)
Yes, there is at least one common owner	Signature of Franklin Templeton 529 College Savings Plan Account Owner
Yes, but the common owner name does not match identically	Signature of Franklin Templeton 529 College Savings Plan Account Owner and bank account owner(s) (Notary would not be required if proof of name change is included)

_____ Date _____
Signature of Franklin Templeton 529 College Savings Plan Account Owner

IF REQUIRED, PLACE NOTARY STAMP/SEAL.

_____ Date _____
Signature of Bank Account Owner

_____ Date _____
Signature of Bank Account Owner

IF REQUIRED, PLACE NOTARY STAMP/SEAL.

IF REQUIRED, PLACE NOTARY STAMP/SEAL.

(For use by Notary Public Only)

On _____ before me, _____ personally appeared
Date Name of Notary Public

Names(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of _____ that the foregoing paragraph is true and correct.
Name of state in which Notary is licensed

WITNESS my hand and official seal. _____
(Signature of Notary Public)

BEFORE YOU SUBMIT...

TO ESTABLISH OR CHANGE AN AUTOMATIC INVESTMENT PLAN DID YOU PROVIDE:

- A typed application or application handwritten in capital letters using blue or black ink.
- A Franklin Templeton case number related to your request on page 1 (if you were provided with one).

SECTION 1

- Full first and last name
- Social Security number/TIN
- Email address

SECTION 2

- Portfolio name(s)
- Amount, start month, frequency and investment date for each

SECTION 3

- Pre-printed voided check, savings deposit slip or letter from your bank on the bank's letterhead

SECTION 4

- The signature of the Franklin Templeton 529 College Savings Plan Account Owner and date signed
- The signature of the Bank Account Owner(s) and date signed (if applicable)
- Notary stamp (if applicable)

MAKE A PHOTOCOPY OF THE COMPLETED FORM FOR YOUR RECORDS

IMPORTANT: If an original signature guarantee or notary is required you may NOT email or fax your documents.

EMAIL	FAX	MAIL
<ul style="list-style-type: none">• Emails MUST include an attachment (PDF preferred) of your request and related case number(s) to be accepted.• If you have not been registered on franklintempleton.com for at least 15 calendar days call (866) 362-1597 to request a case number to reference in your email. <p>Financial Advisors: ftrequests@franklintempleton.com Shareholders: shrequests@franklintempleton.com</p>	(855) 891-8377	<p>Regular Mail</p> <ul style="list-style-type: none">• Franklin Templeton 529 College Savings Plan P.O. Box 997153 Sacramento, CA 95899-7153• Franklin Templeton 529 College Savings Plan P.O. Box 33090 St. Petersburg, FL 33733-8090 <p>Overnight</p> <ul style="list-style-type: none">• Franklin Templeton 529 College Savings Plan 3344 Quality Drive Rancho Cordova, CA 95670-7313• Franklin Templeton 529 College Savings Plan 100 Fountain Parkway N. St. Petersburg, FL 33716-1205

Visit franklintempleton.com to access your account(s) online and learn about Franklin Templeton funds and products.