

# 529 College Savings Plan

# **Automatic Investment Plan Form**

- Use this form to establish or change an automatic investment plan from your bank account into an existing Franklin Templeton 529 College Savings Plan Account.
- To open a NEW account, complete a Franklin Templeton 529 College Savings Plan Account Application available at franklintempleton.com.

	If completing by ha	nd, please print	clearly in CAPIT	AL LETTER	S using blue or	black ink.	
If applicable, provide any	Franklin Templeton case nu	mber(s) related to	your request:				
1 1 ACCOUNT INFORM	MATION						
Account Owner first name			M.I.	Last name			Suffix
Email address <sup>1</sup>						Acco	ount Owner SSN/TIN
Primary phone number			Alterna	te phone nur )	mber		
2 AUTOMATIC INVEST	TMENT PLAN						
Complete this section to es	tablish an automatic investme	nt plan directly FR0	OM a bank accou	nt TO your Fra	anklin Templeton 5	529 College Savir	ngs Plan portfolio(s).
investment. \$25 investment. If Frequency and Investon the 20th.	vitake up to 15 days to establish nent minimum per portfolio. ment Date are not selected, w alls on a non-business day, the business day.	e will default to mo	nthly • If yo leas:	requency. u select twice t 10 days apar		equency, the select two dates or	wice a month as ected dates must be at select dates tha are not
Select ONE of the following	ng:						
	sted under the SSN/TIN provi	_	\$	per portfolio.			
START MONTH OR	FREQUENCY (select one)  ☐ monthly ☐ twice a month	☐ quarterly ☐ annually	INVESTMENT D  1st  5th	<b>ATE</b> ☐ 10th ☐ 15th	☐ 20th ☐ 25th		
Specify a different start PORTFOLIO NAME/NUMBEI	month, frequency and investm	ent date(s) for only  AMOUNT	the portfolio(s) li START M		FREQUENCY (select o	امر	INVESTMENT DATE
	,	\$   \$   \$   \$			monthly twice a month monthly twice a month monthly monthly monthly	quarterly annually quarterly annually quarterly annually annually	1st   10th   20th   5th   15th   25tr   5th   15th   25tr   5th   15th   25tr   5th   15th   20tr   5th   15th   25tr   5th   15th   25tr
		\$			☐ monthly ☐ twice a month	☐ quarterly☐ annually	☐ 1st ☐ 10th ☐ 20th ☐ 5th ☐ 15th ☐ 25th

☐ monthly

quarterly

twice a month annually

☐ 1st ☐ 10th ☐ 20th ☐ 5th ☐ 15th ☐ 25th

<sup>1.</sup> 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.

### 3 BANK INFORMATION FOR ELECTRONIC SERVICES

Please establish/change electronic transfers to or from my bank account for all portfolio(s) listed under the SSN/TIN provided in Section 1. Only one bank account can be linked to my Franklin Templeton account(s) for purchases and redemptions. If my bank or credit union is not an Automated Clearing House (ACH) member, this service is not available.

- These bank instructions will be established for purchases, automatic investment plan transfers and redemptions.
- Any bank account owner who is not an owner of the Franklin Templeton 529
   College Savings Plan Account must sign in Section 4.
- No checks? Include 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 form. Handwritten information on the
  savings deposit slip or bank letterhead is not acceptable.

#### Select ONE of the following options:

Use my enclosed letter from my bank.
☐ Use my enclosed preprinted voided check.
Use my enclosed preprinted checking deposit slip.
Use my enclosed preprinted savings deposit slip.
Bank routing number (9 digits) Bank account number

## 4 AUTHORIZATION AND SIGNATURE

Certain capitalized terms herein are used as defined for purposes of the current *Program Description*, 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 Distributors, LLC, 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 *Program Description* for more complete information.
- I authorize Franklin Distributors, LLC, or its designee, 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 Program Description.
- If I request transfers to or from my bank account in this form or at any time, including by telephone, electronically or otherwise, you are authorized to make those requested transfers (and to make, if necessary, adjusting transfers if any amounts are transferred in error). I agree that Franklin Templeton may make additional attempts to debit/credit the 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 I can end this authorization at any time by notifying you in writing, by telephone or by terminating on franklintempleton.com. If I am an owner of the bank account identified in Section 3 of this form, I certify that my signature alone is sufficient to authorize debits from the bank account.
- 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 the Franklin Templeton 529 College Savings Plan Account Owner is always required.
- If establishing new bank 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 the bank account owner(s)?	Signature Requirement
No common owner	Notarized signatures of the Franklin Templeton 529 College Savings Plan Account Owner and the bank account owner(s)
Yes, there is at least one common owner	Signature of the Franklin Templeton 529 College Savings Plan Account Owner
Yes, but the common owner name does not match identically	Notarized signatures of the Franklin Templeton 529 College Savings Plan Account Owner and the bank account owner(s)  (Notary would <b>not</b> be required if proof <sup>2</sup> of name change is included)

2. A photocopy of the court document that authorizes the name change. If the name change is due to marriage, a photocopy of the document evidencing marriage issued by the appropriate city, county, or state governmental body is acceptable. A document evidencing marriage issued by a church or other entity is not acceptable.

4 AUTHORIZATION AND SIGNATURE (cont'd.)			
FRANKLIN TEMPLETON 529 COLLEGE SAVINGS PLAN ACCOUNT OW	/NER'S SIGNATURE ONLY		
The Account Owner named in Section 1 must sign this	form. See previous page	e for signature requirements.	
			Date
X Signature of Franklin Templeton 529 College Savings Plan.	Account Owner		
olynatic of transmit templeton 32 / conege davings train.	Account Owner		
IF REQUIRED, PLACE NOTARY STAMP/SEAL HERE.			
BANK ACCOUNT OWNER(S) SIGNATURE(S) ONLY			
	anklin Templeton 529 C	ollege Savings Plan Account must sign below. See previou	s page for
signature requirements.	D-+-		Data
x	Date 	<b>x</b>	Date
Signature of Bank Account Owner	_	Signature of Bank Account Owner	
IF REQUIRED, PLACE NOTARY STAMP/SEAL HERE.		IF REQUIRED, PLACE NOTARY STAMP/SEAL HERE.	
(For use by Notary Public Only)			
On before me,			personally appeared
Date	N	ame of Notary Public	
		of Signer(s)	
		ame(s) is/are subscribed to the within instrument and acknowle s/her/their signature(s) on the instrument the person(s), or the	-
I certify under PENALTY OF PERJURY under the laws of _		that the foregoing paragra	ph is true and correct
		which Notary is licensed	, 2 1 22 2.74 00.700
WITNESS my hand and official seal. X		(Signature of Notary Public)	

BEFORE YOU SUBMIT TO ESTABLISH OR CHANGE AN AUTOMATIC INVESTMENT PLAN – DID YO	DU PROVIDE?
☐ A typed form or form handwritten in capital letters using blue or black ink.	
$\hfill \square$ A Franklin Templeton case number related to your request on page 1 (if you v	were provided with one).
SECTION 1	SECTION 3
Full first and last name	Pre-printed voided check, savings deposit slip or letter from your bank on the bank's letterhead included with your completed form
Social Security number/TIN	bunks letternedd inoladed with your completed form
☐ Email address	SECTION 4
SECTION 2	☐ The signature of the Franklin Templeton 529 College Savings Plan Account
☐ Portfolio name(s)	Owner and date signed
☐ Amount, start month, frequency and investment date(s) for each	☐ 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

EMAIL	FAX	MAIL
Emails <b>MUST</b> include an attachment (PDF preferred) of your request and related case number(s) to be accepted.	(855) 891-8377	You may use any of the below mailing addresses  Regular Mail
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.		<ul> <li>Franklin Templeton 529 College Savings Plan P.O. Box 33090</li> <li>St. Petersburg, FL 33733–8090</li> </ul>
Financial professionals: ftrequests@franklintempleton.com Shareholders: shrequests@franklintempleton.com		• Franklin Templeton 529 College Savings Plan P.O. Box 997153 Sacramento, CA 95899–7153
		Overnight • Franklin Templeton 529 College Savings Plan 100 Fountain Parkway N. St. Petersburg, FL 33716–1205
		Franklin Templeton 529 College Savings Plan 3344 Quality Drive Rancho Cordova, CA 95670-7313



