

5A DISTRIBUTION PAYABLE TO THE OWNER OR BENEFICIARY

- Send electronically to Account Owner bank account (Complete Section 4)
 Send electronically to Beneficiary bank account (Complete Section 4)
 Make a check payable to the Account Owner and mail to the address on file.
 Make a check payable to the Beneficiary and mail to the address on file.
 Mail a check to an alternate address. **(If not already on file, a signature guarantee is required.)**
 Send check(s) to a new mailing address and update the address on the account(s). **(A signature guarantee is required.)**

Name

Address City State ZIP

5B DISTRIBUTION TO AN ELIGIBLE HIGHER EDUCATION INSTITUTION, LOAN PROVIDER OR REGISTERED APPRENTICESHIP PROGRAM

Note: The beneficiary must be the same as on the account(s).

Mail a check to the institution's address.

Name of Institution

c/o or Attn

Name of Beneficiary

Student ID or Ref #

Address City State ZIP

- Check here if the check should be made payable to the institution but should be mailed to your address of record.

5C ROLLOVER DISTRIBUTION (NOT SUBJECT TO TAX PENALTY AS LONG AS ANOTHER ROLLOVER HAS NOT TAKEN PLACE FOR THE BENEFICIARY WITHIN 12 MONTHS)

I will be transferring the payment to another Qualified Tuition Program Account in accordance with applicable requirements for rollover distributions. I acknowledge that I have read the *Investor Handbook* and am familiar with and responsible for compliance with the various requirements applicable to rollover distributions described therein.

A Signature Guarantee will be required unless we receive a letter of acceptance from the new 529 plan custodian.

"Rollover Distributions" are not subject to federal income taxation. A "Rollover Distribution" includes any of the following:

- (1) Within 60 days of a distribution you transfer the funds withdrawn from your Plan Account to another Plan Account in the Program for a new Beneficiary who is a "member of the family" of the prior Beneficiary.
- (2) Within 60 days of your distribution of funds from a Plan Account in the Program you transfer such funds to an account established in another qualified tuition program established under Section 529 with a different beneficiary who is a "member of the family" of the Beneficiary of your Plan Account.
- (3) Within 60 days of your distribution of funds from a Plan Account in the Program you transfer such funds to an account established in another qualified tuition program established under Section 529 with the same beneficiary as the Beneficiary of your Plan Account, provided such transfer does not occur within 12 months from the date of a previous transfer to any qualified tuition program for the benefit of the same beneficiary.

See the *Investor Handbook* for the definition of "member of the family" and for more details on Rollover Distributions.

Note: Account Owner with Franklin Templeton must be the same as the new Qualified Tuition Program Account Owner.

Name of Qualified Tuition Program Name of Beneficiary with new Qualified Tuition Program Account

Name of Account Owner with new Qualified Tuition Program Account

Address City State ZIP

Reference # or Account # Check if the new Qualified Tuition Program Account(s) is an UGMA/UTMA
 UGMA UTMA

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.

Scenario	Signature Requirement
Requesting a service that involves activity between your Plan Account and your bank account, and the two accounts are registered in different names	A signature guarantee is required
Requesting wire transfers after your Plan Account has been established	A signature guarantee is required
Directing payments to a third party other than the beneficiary's educational institution, loan provider or registered apprenticeship program	A signature guarantee is required
The distribution is for more than \$100,000	A signature guarantee is required
Distribution will be sent to a new address	A signature guarantee is required
Rollover Distribution to another Qualified Tuition Program Account	A signature guarantee is required, unless a letter of acceptance is provided from the new Program Manager. If the request is over \$100,000, a signature guarantee is always required.

Is there at least one common owner between the Franklin Templeton 529 College Savings Plan Account Owner and bank account owner(s)?	
No common owner	Notarized signature of 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	Notarized signature of Franklin Templeton 529 College Savings Plan Account Owner and bank account owner(s) (Notary would not be required if proof ⁴ of name change is included)

I hereby request payment from the Franklin Templeton 529 College Savings Plan designated on this form in the manner indicated. I expressly assume full responsibility for all tax implications of this distribution, and I certify under penalty of perjury that all information contained herein, including my Social Security number, is true and correct.

_____ Date _____

Signature of Franklin Templeton 529 College Savings Plan Account Owner

IF REQUIRED, PLACE NOTARY STAMP/SEAL or SIGNATURE GUARANTEE STAMP⁴ HERE.

Signature of Bank Account Owner

IF REQUIRED, PLACE NOTARY STAMP/SEAL HERE.

Signature of Bank Account Owner

IF REQUIRED, PLACE NOTARY STAMP/SEAL HERE.

(For use by Notary Public Only)

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

Name(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)

4. 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.

5. If a signature guarantee is required, A NOTARY SEAL IS NOT ACCEPTABLE. Please have each signature separately 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. These institutions often participate in signature guarantee medallion programs such as the Securities Transfer Agent Medallion Program (STAMP). A notary public cannot provide a signature guarantee.

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BEFORE YOU SUBMIT...

TO REQUEST A DISTRIBUTION - DID YOU PROVIDE:

- A typed form or form 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-Account number(s)
- Distribution amount or %

SECTION 3

- Type of distribution

SECTION 4

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

SECTION 5

- Payment Option

SECTION 6

- 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)
- Signature guarantee or 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

