529 FWD 07/13

FRANKLIN TEMPLETON INVESTMENTS

Franklin Templeton 529 College Savings Plan[1]
Withdrawal Form

Use this form to request a withdrawal from a 529 Plan Account. Please note that only the Plan Account Owner may request a withdrawal.

If you have previously received a withdrawal and would like to request another withdrawal to an address already on file, you can call (866) 362-1597 to request a withdrawal by phone.

Please print clearly in CAPITAL LETTERS using blue or black ink.

1 ACCOUNT INFORMATION

If any information below varies from the information that is on file, please refer to **Section 5** for Signature Guarantee instructions.

Account Owner first name | M.I. | Last name | Account Owner SSN/TIN

Daytime phone number (required) ( ) | Alternate phone number (optional) ( )

Beneficiary first name | M.I. | Last name | Beneficiary SSN/TIN

Account number

2 WITHDRAWAL INFORMATION

In connection with a withdrawal from your Plan Account, you may be asked to provide supporting documentation to or for the IRS.

Investment Option	Share Class A	Share Class B	Share Class C	Withdrawal $ Amount or %
Age-Based Asset Allocations Withdrawal to be made from:				
Conservative Age-Based Asset Allocation	☐	☐	☐	_____
Moderate Age-Based Asset Allocation	☐	☐	☐	_____
Growth Age-Based Asset Allocation	☐	☐	☐	_____
Objective-Based Asset Allocations Withdrawal to be made from:				
Corefolio® Portfolio	☐	☐	☐	_____
Franklin Templeton Founding Funds Portfolio	☐	☐	☐	_____
Growth Portfolio	☐	☐	☐	_____
Growth and Income Portfolio	☐	☐	☐	_____
Income Portfolio	☐	☐	☐	_____

Investment Option	Share Class A	Share Class B	Share Class C	Withdrawal $ Amount or %
Individual Portfolios Withdrawal to be made from:				
Franklin Growth 529 Portfolio	☐	☐	☐	_____
Franklin Small- Mid Cap Growth 529 Portfolio	☐	☐	☐	_____
Mutual Shares 529 Portfolio	☐	☐	☐	_____
Templeton Growth 529 Portfolio				_____
Franklin Income 529 Portfolio	☐	☐	☐	_____
S&P 500 Index 529 Portfolio	☐	☐	☐	_____
Franklin Templeton Stable Value 529 Portfolio	☐	☐	☐	_____
TOTAL WITHDRAWAL AMOUNT[2]				_____

1. Offered and administered by the New Jersey Higher Education Student Assistance Authority (HESAA); managed and distributed by Franklin Templeton Distributors, Inc., an affiliate of Franklin Resources, Inc., which operates as Franklin Templeton Investments. 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.

2. Please note that if your withdrawal is made through the redemption of Class B Trust Shares or Class C Trust Shares, a contingent deferred sales charge (CDSC) may be applicable to the withdrawal under the circumstances described in the *Investor Handbook* for contributors investing through a financial advisor. If any CDSC is applicable in connection with your withdrawal, the program administrator will redeem the number of Trust Shares in the Investment Options you have indicated to be redeemed, taking into account the amount of the applicable CDSC, to provide the cash amount you have specified, or, if only a lesser number of Trust Shares is available in your Plan Account, the number of Trust Shares available (in which event the amount the payee you have designated receives may be less than the withdrawal amount you have specified).

2 WITHDRAWAL INFORMATION (cont'd.)

Franklin Templeton Distributors Inc. or its designee is required to file a Form 1099-Q with the IRS for all distributions. This form requires us to report your Gross Distribution, the amount of earnings included in the Gross Distribution, whether the distribution is a trustee-to-trustee transfer information about the withdrawal recipient (including name, address and Social Security number), and whether the recipient is the Beneficiary of the Plan Account.[3] Unless otherwise required under applicable law and regulations: (1) if a check or other distribution is made payable to a Beneficiary or an eligible educational institution on behalf of the Beneficiary, we will report the distribution under the Beneficiary's Social Security number, and (2) if a check or other distribution is made to the Plan Account Owner or any other party that is not the Beneficiary, we will report the distribution under the Plan Account Owner's Social Security number.

As discussed in more detail in the *Investor Handbook*, the Plan Account Owner must maintain records and documentation substantiating the nature of any withdrawal that he or she intends to treat, for tax purposes, as a Qualified Distribution, a withdrawal on account of the death or permanent disability of the Beneficiary or the receipt of a scholarship or tuition waiver by the Beneficiary, or a Rollover Distribution. The information requested below is intended only to assist you in meeting this record-keeping obligation.

3 TYPE OF DISTRIBUTION

Please check the type of distribution below.

- ☐ Distribution payable to the Account Owner or Beneficiary (complete Section 3A)
- ☐ Distribution payable to an eligible higher education institution (complete Section 3B)
- ☐ Rollover distribution (complete Section 3C)
- ☐ Distribution due to scholarship (complete Section 3A)
- ☐ Distribution due to disability (complete Section 3A)
- ☐ Distribution due to death of Beneficiary (complete Section 3A)

3A DISTRIBUTION PAYABLE TO THE OWNER OR BENEFICIARY

- ☐ Please make a check payable to the Account Owner and mail to the address on file.
- ☐ Please make a check payable to the Beneficiary and mail to the address on file.
- ☐ Please send proceeds directly to the Account Owner's and/or the Beneficiary's bank via the Automated Clearing House (ACH) System.[4] (ACH transfers are normally received within 2–4 business days. **If bank information is not already on file, we require a pre-printed, voided check or savings account deposit slip in Section 4.**)
- ☐ Please send proceeds directly to the Account Owner's and/or the Beneficiary's bank account via a Federal Wire.[4] ($1,000 minimum applies. Federal Wire transfers are normally received the next business day. **If bank information is not already on file, we require a pre-printed, voided check or deposit slip in Section 4. A Signature Guarantee is required to wire to bank account not already on file.**)
- ☐ Please mail a check to an alternate address. (**If not already on file, a signature guarantee is required.**)

Name

Address

City | State | ZIP

3B DISTRIBUTION TO AN ELIGIBLE HIGHER EDUCATION INSTITUTION

Please mail a check to the education institution's address.

Name of Institution

c/o

Name/Student ID#/Ref#/Attn:

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.

3. We expressly reserve the right to report any additional information that the IRS may require in future versions of this form.
4. We suggest that you confirm your bank's ability to accept these transactions and inquire about any bank fees.

3 TYPE OF DISTRIBUTION (cont'd.)

3C ROLLOVER DISTRIBUTION (NOT SUBJECT TO TAX PENALTY AS LONG AS ANOTHER ROLLOVER HAS NOT TAKEN PLACE FOR THE BENEFICIARY WITHIN 12 MONTHS)[5]

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.

Name of Qualified Tuition Program

Name of Beneficiary

Address

City

State

ZIP

4 PAYMENT INSTRUCTIONS

BANK ACCOUNT INFORMATION

Please provide your bank account information if you have requested payments to be transferred directly to your bank account.

☐ Checking Account

☐ Savings Account

Bank name

9-digit bank ABA routing number

Bank account number

If the Franklin Templeton portfolio account(s) and the bank account identified above DO NOT include at least one common owner, all bank account owners must sign here and have their signatures guaranteed; and the Account Owner signing in Section 5 must also have their signature guaranteed.

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.**

SIGNATURE OF BANK ACCOUNT OWNER Date

X

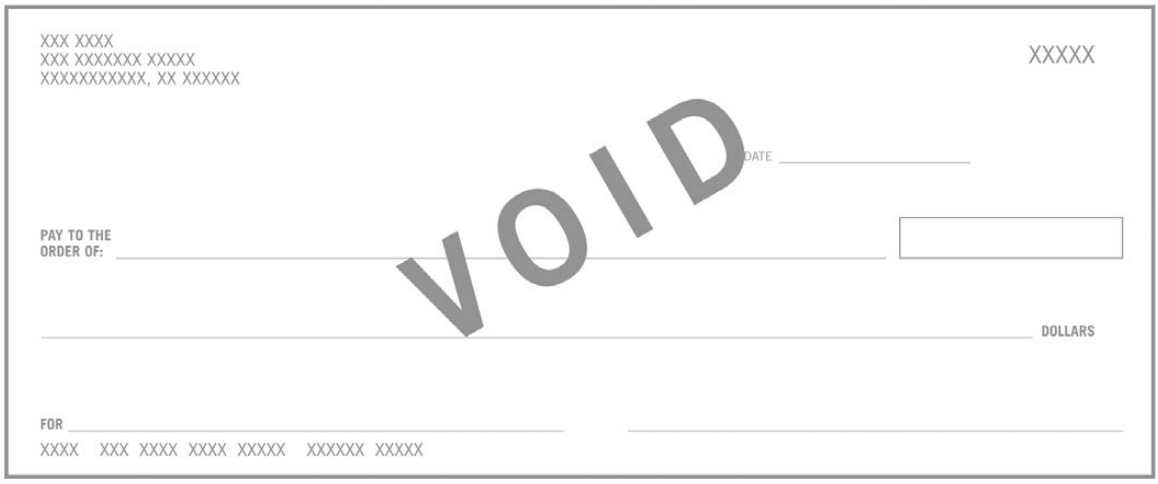
SIGNATURE OF BANK ACCOUNT OWNER Date

X

SIGNATURE GUARANTEE STAMP

SIGNATURE GUARANTEE STAMP

TAPE A VOIDED CHECK OR SAVINGS ACCOUNT DEPOSIT SLIP HERE. PLEASE DO NOT STAPLE.



5. "Rollover Distributions" are not subject to federal income taxation. A "Rollover Distribution" includes any of the following: (1) within 60 days of a withdrawal 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 withdrawal 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 and, if required under Section 529 at the time of such transfer, designate a new Beneficiary of such Plan Account who is a "member of the family" of the prior Beneficiary. See the Investor Handbook for the definition of "member of the family" and for more details on Rollover Distributions.

5 SIGNATURE

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

X

Signature of Plan Account Owner, or of UTMA/UGMA custodian for UTMA/UGMA Account, or of authorized signer of Plan Account Owner that is a corporation or other entity

SIGNATURE GUARANTEE STAMP (if required)

For your protection, a signature guarantee is required if:

- you have requested a service that involves activity between your Plan Account and your bank account, and the two accounts are registered in different names, or
- if you are requesting wire transfers after your Plan Account has been established, or
- if you are directing payments to a third party, or
- if the distribution is for more than $100,000.

A signature guarantee can be obtained from a bank, savings and loan association, trust company, credit union, broker/dealer, or any other "eligible guarantor institution" 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.**

Please mail to	WEST COAST	EAST COAST
	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
Overnight	3344 Quality Drive Rancho Cordova, CA 95670-7313	100 Fountain Parkway St. Petersburg, FL 33716-1205

FRANKLIN TEMPLETON INVESTMENTS

HESAA
HIGHER EDUCATION STUDENT ASSISTANCE AUTHORITY