



**FRANKLIN
TEMPLETON**

529 College Savings Plan

Workplace 529 Program Broker-Dealer Revision Form

529 WPBDR 12/22

Use this form if you are converting an existing Franklin Templeton 529 College Savings Plan Account portfolio to a Workplace 529 Program account with a new broker-dealer **OR** the broker-dealer is waiving the initial sales charge for Class A Trust shares on a Workplace 529 Program account. To change the broker-dealer on other Franklin Templeton accounts, use the *Change of Broker-Dealer Form*.

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

If applicable, provide any Franklin Templeton case number(s) related to your request: _____

1 CURRENT ACCOUNT INFORMATION

☐ **CHECK HERE IF THIS IS A NEW ADDRESS.**

Account Owner first name	M.I.	Last name	Suffix	OR	Name of Custodianship/Trust/Other
_____	_____	_____	_____		_____
Street address of residence (no P.O. Box address)		City	State	ZIP	
_____		_____	_____	_____	
Mailing address (if different from above)		City	State	ZIP	
_____		_____	_____	_____	
Primary phone number ()	Alternate phone number ()		Account Owner SSN/TIN 		
Email address2 _____					

I AUTHORIZE THE CHANGE OF BROKER-DEALER ON:

ALL 529 College Savings Plan portfolios registered under the following SSN/TIN, or broker identification number or asset summary number:

SSN/TIN _____	Broker identification number _____	Asset summary number _____
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2 EMPLOYER INFORMATION

Employer name _____	Employer Tax ID 		
Employer street address _____	City _____	State 	ZIP
H.R. department contact name _____	Daytime phone number ()		

3 BROKER-DEALER INFORMATION

For a broker-dealer to be added to a 529 Plan Account, the broker-dealer must have an effective 529 Plan selling addendum or other 529 Plan selling agreement with Franklin Distributors, LLC.

NOTE: A change in broker-dealer on an account with an established broker-dealer net asset value (NAV) purchase privilege will result in the immediate termination of those privileges. It is the responsibility of the new broker-dealer and the financial professional to establish and retain this privilege. The financial professional must complete Section 5 of this form to retain the privilege.

New securities dealer name _____				
Main office address _____		City _____	State 	ZIP
Financial professional first name _____	M.I. 	Last name _____	Suffix 	Telephone number ()
Financial professional email _____	Dealer number 		Branch number 	Financial professional number
Branch address _____		City _____	State 	ZIP

1. Offered and administered by the New Jersey Higher Education Student Assistance Authority (HESAA); 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.

2. 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.

4 REQUIRED SIGNATURES**FRANKLIN TEMPLETON 529 COLLEGE SAVINGS PLAN ACCOUNT OWNER'S SIGNATURE ONLY**

The Account Owner named in Section 1 must sign this form.

X

Franklin Templeton 529 College Savings Plan Account Owner

Date

AUTHORIZED SIGNER OF BROKER-DEALER ONLY

The FINRA registered principal of the firm for the securities dealer listed in Section 3 must sign below.

Name (please print)

Title

Phone number

()

X

Authorized signature (Registered Principal for the Securities Dealer)

Date

5 BROKER-DEALER USE ONLY – OPTIONAL SALES CHARGE WAIVER FOR CLASS A TRUST SHARES

This application for the purchase of Trust shares complies with the terms of our 529 Plan selling agreement or 529 addendum with Franklin Distributors, LLC ("Distributors") and with the current 529 Plan *Program Description* and account application.

- ☐ We authorize the named applicant to purchase Class A Trust shares of the 529 Plans distributed by Distributors at net asset value (NAV), waiving the initial sales charge. We further certify that the applicant qualifies for such purchases in accordance with the terms of the 529 Plan *Program Description* and applicable broker-dealer policy.

Securities dealer name

Name (please print)

Title

Phone number

()

X

Authorized signature (Registered Principal for the Securities Dealer listed above)

Date

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.Digital communication channels are not necessarily secure. If you do choose to send confidential or sensitive information to us via digital communication channels (e.g. email, chat, text messaging, fax), you are accepting the associated risks related to potential lack of security, such as the possibility that your confidential or sensitive information may be intercepted/accessed by a third party and subsequently used or sold. <p>Financial Professionals: ftrequests@franklintempleton.com Shareholders: shrequests@franklintempleton.com</p>	(855) 891-8377	<p>You may use any of the below mailing addresses:</p> <p>Regular Mail</p> <ul style="list-style-type: none">Franklin Templeton 529 College Savings Plan P.O. Box 33090 St. Petersburg, FL 33733-8090Franklin Templeton 529 College Savings Plan P.O. Box 997153 Sacramento, CA 95899-7153 <p>Overnight</p> <ul style="list-style-type: none">Franklin Templeton 529 College Savings Plan 100 Fountain Parkway N. St. Petersburg, FL 33716-1205Franklin Templeton 529 College Savings Plan 3344 Quality Drive Rancho Cordova, CA 95670-7313

