

Designation of successor custodian
for UGMA/UTMA accounts



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Use this form to designate a successor custodian(s) for a Putnam minor account registered under the Uniform Gifts to Minors Act or the Uniform Transfers to Minors Act (UGMA/UTMA). This form is not effective until Putnam receives it in good order. Any successor custodian(s) designated on this form will replace any previously designated successor custodian(s) for the account. You may designate a successor custodian only if you are the current custodian of the account.

Section 1 Account information

Name of custodian
First MI Last Suffix Social Security number Date of birth (mm/dd/yyyy)

Contact phone number

Note: Providing a phone number above will replace the current contact information on file with Putnam (if applicable).

Name of minor
First MI Last Suffix Social Security number Date of birth (mm/dd/yyyy)

Section 2 Successor custodian

I hereby designate the following successor custodian in the event of my resignation, disability or death.

Name of successor custodian
First MI Last Suffix Social Security number Date of birth (mm/dd/yyyy)

Name of contingent successor custodian
First MI Last Suffix Social Security number Date of birth (mm/dd/yyyy)

Section 3 Authorization

I hereby make the successor custodian designation(s) indicated above and revoke any previous designations made by me for the above account(s). I certify that the information contained herein is true and correct.

The custodianship remains subject to UGMA/UTMA provisions of the original donor state in which the transfer/gift was made despite a subsequent change in residence of a transferor, the minor, or the custodian.

Your signature below must be either notarized or validated with a Signature Validation Program (SVP) stamp.

A notary must include the date of certification, the original signature of the person whose signature is being notarized, the original signature of the notary public, an original notary stamp or seal, and the date of notary commission expiration. A SVP stamp is a stamped assurance for non-financial transactions by a financial institution that indicates a signature is valid.

Signature of current custodian

Print name of signer

Current date (mm/dd/yyyy)

PLACE NOTARY OR SVP STAMP BELOW



# Signature authentication guidelines



Use this document as a reference to explain the different authentications that may be required to process a transaction. Please refer to the specific Putnam form to verify which type of authentication is required as not all signature authentication types are acceptable for all transactions. You may be able to obtain signature authentication from securities broker/dealers, commercial banks, federally chartered savings institutions, federally chartered credit unions, trust companies, state chartered savings institutions or credit unions. Check with your financial institution for availability.

All authentications must be original; photocopies or fax copies are not acceptable.

This document is for reference only. Please **do not stamp this form**.

## Medallion Program Signature Guarantee

A Medallion Program signature guarantee is a form of signature guarantee that is a stamped assurance provided by a financial institution that guarantees that a signature is genuine, the signer is an appropriate person to sign and the signer has legal capacity to sign. The purpose of a signature guarantee is to protect transfer agents and shareholders against loss from fraudulent signatures on instructions in connection with securities transactions, which are defined as the sale, assignment, transfer or redemption of a security. A Medallion Program signature guarantee provides additional protection against fraud by using special security ink, a bar code that can be scanned to identify a stamp that has been reported lost or stolen, and a prefix code that discloses the maximum transaction value covered by the stamp (see chart below). The guarantee should **not** be dated.

Prefix Letter	Liability Limit per Transaction
Z	\$10,000,000
Y	\$5,000,000
X	\$2,000,000
A	\$1,000,000
B	\$750,000
C	\$500,000
D	\$250,000
E	\$100,000
F	\$100,000 (credit unions only)



The letter prefix of each identification number signifies the amount of the surety bond obtained by the guarantor. The amount of coverage associated with the corresponding prefix is detailed above.

## Signature Guarantee

A signature guarantee is a stamped assurance provided by a financial institution that guarantees that a signature is genuine, the signer is an appropriate person to sign and the signer has legal capacity to sign. The purpose of the signature guarantee is to protect transfer agents and shareholders against loss from fraudulent signatures on instructions in connection with securities transactions, which are defined as the sale, assignment, transfer or redemption of a security.



## Signature Validation Program (SVP)

An SVP stamp is a stamped assurance provided by a financial institution that authenticates signatures for non-securities related commercial transactions. The purpose of the signature validation is to protect transfer agents and shareholders against loss from wrongful or fraudulent signatures in connection with clerical and other account maintenance updates.



## Notary

A notary public is a person authorized by the state in which the person resides to administer oaths (swearing to the truth of a statement) and take acknowledgments. The signature and seal or stamp of a notary public is necessary to attest to the oath of truth of a person making an affidavit and to attest that a person has acknowledged that he/she has executed a document; and the signature and seal/stamp is required for the recording of public records in court. Please note that unlike a signature guarantee or medallion guarantee, a notary stamp or seal does not provide Putnam with any financial liability coverage for transactions.

A notary **must** include the date of certification, the original signature of the person whose signature is being notarized, the original signature of the notary public, an original notary stamp or seal, and the date of notary commission expiration.