

Putnam 529 for AmericaSM
distribution request form



Return by standard delivery:
Putnam Investments
PO Box 219697
Kansas City, MO 64121-9697

Return by overnight delivery:
Putnam Investments
801 Pennsylvania Ave
Suite 219697
Kansas City, MO 64105-1307

For more information:
Putnam Investments
1-877-PUTNAM529
1-877-788-6265
www.putnam.com



Use this form to request a complete, partial, or systematic distribution from your Putnam 529 for America account. Distributions from the account have different tax consequences depending on how the proceeds are used, whether you claim certain federal tax benefits, and certain other factors. State tax treatment of withdrawals used for elementary or secondary school tuition may vary by state, may not align with federal tax withholding, and may be uncertain. You may wish to consult your tax advisor prior to requesting a distribution. Please see the current Offering Statement for details.

Section 1 Account owner and beneficiary information

Name of owner (Individual/organization/trust)	Social Security/tax ID number (required)	Date of birth (mm/dd/yyyy)
<div></div>	<div></div>	<div></div>
Contact phone number		
<div></div>		

Note: Providing a phone number above will replace the current contact information on file with Putnam (if applicable). If this field is left blank, no changes will be made.

Name of beneficiary				Social Security number (required)	Date of birth (mm/dd/yyyy)
First	MI	Last	Suffix		
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Section 2 Type of distribution

- I request the following (check one):
- ☐ Qualified distribution (funds will be used for the qualified education of the current beneficiary). The account owner/beneficiary is responsible for documenting the use of funds for tax purposes.
 - ☐ Non-qualified distribution (funds will not be used for the qualified education of the current beneficiary). Note: The earnings portion of a non-qualified withdrawal will be taxed at the recipient's tax rate and a penalty equal to 10% of the earnings distributed will be imposed.
 - ☐ Rollover to another Section 529 Qualified Tuition Program. Indicate in Section 4 the other qualified tuition plan's name, beneficiary's name, and the account number. If no beneficiary name is provided, Putnam will default to the current beneficiary.
 - ☐ Distribution on account of a scholarship award. Attach a copy of the scholarship award letter.
 - ☐ Distribution due to the permanent disability of the beneficiary. Attach a doctor's letter stating that the beneficiary is unable to attend any eligible educational institution because the injury or illness is expected to continue indefinitely.
 - ☐ Distribution due to the death of the beneficiary. Attach a certified copy of the beneficiary's death certificate with their name and Social Security number.

Section 3 One-time distribution options

Please select from the options below:

- ☐ Distribute 100% of the assets in all Putnam 529 for America accounts for the owner/beneficiary combination named in Section 1

Or

- ☐ Take a one-time distribution from the following account(s):

Fund number	Account number	Dollar amount	Percentage
<div></div>	<div></div>	\$ <div></div>	<div></div> %
<div></div>	<div></div>	\$ <div></div>	<div></div> %
<div></div>	<div></div>	\$ <div></div>	<div></div> %
<div></div>	<div></div>	\$ <div></div>	<div></div> %

Section 4 Distribution payment instructions

Select your payment instructions below; if no selection/instructions are provided, payment will be made to the account owner as registered to the address of record. See Section 6 for signature guarantee/medallion guarantee stamp requirements.

- IRS form 1099-Q will be sent to the beneficiary for distribution proceeds payable to (1) the beneficiary or (2) an eligible educational institution.
- IRS form 1099-Q will be sent to the account owner for distribution proceeds payable to (1) the account owner, (2) a new Section 529 Qualified Tuition Program, or (3) an alternate payee.

Electronically deposit (a signature guarantee/medallion guarantee and one of the applicable bank documents are required)

- ☐ Into the bank account indicated on the attached document. A preprinted or web-generated voided check/deposit slip or a signed letter from the bank on bank letterhead must be attached. Each of these documents must include: bank name, name(s) as registered on the bank account, routing number and account number. Brokerage checks and investment company checks cannot be used for bank instructions as these checks do not contain the correct wiring information. Contact your investment company to obtain proper wire instructions on signed letterhead. Starter checks will not be accepted. Please do not staple.

For electronic deposits to an educational institution, attach a document on the institution's letterhead. The document must include: name of the educational institution, routing number, account number, student name and student ID.

Check the bank account you would like to use: ☐ Checking account ☐ Savings account

Note: One-time distributions will be sent via Federal bank wire; systematic distributions will be sent via Automated Clearing House (ACH). Putnam does not assess a fee for electronic transactions; however some financial institutions may assess a fee upon receipt. Please check with your financial institution for information regarding eligibility, fees, and applicable routing number(s) for Federal bank wire and/or ACH transactions

Tape voided check/deposit slip here

ABA routing number of financial institution	Bank account number
<input type="text"/>	<input type="text"/>
Name(s) of all bank account owner(s)/name of educational institution	For further credit (if applicable)
<input type="text"/>	<input type="text"/>

Send check

- Step 1: Select a delivery method
- ☐ Mail check(s) via U.S. Postal Service (standard delivery)
 - ☐ Mail check(s) via overnight/express delivery (not available for systematic redemptions)

Indicate the \$20 overnight/express fee source, otherwise Putnam will default to taking the fee from the lowest fund-account involved in the transaction. The fee will be taken from the balance of the account.

Fund number	Account number
<input type="text"/>	<input type="text"/>

Step 2: Provide payee/address instructions

- ☐ To the account owner as registered to the address of record.
- ☐ To the alternate payee/alternate address listed below:

Name of institution/529 qualified tuition program/alternate payee	Student ID/account number (if applicable)
<input type="text"/>	<input type="text"/>
Name of beneficiary (if applicable)	
<input type="text"/>	
Alternate mailing address (street, city, state, ZIP code)	
<input type="text"/>	

Section 5 Systematic distribution options

Systematic distributions from your Putnam 529 for America account are only allowed for qualified education expenses. Please indicate a date and frequency for systematic distributions. **If no date is selected, Putnam will default to the 15th.** If the systematic distribution date falls on a weekend or a holiday, the distribution will be made the next business day. If the distribution date falls on a date that does not occur within a particular month (29th-31st), the distribution will be made the prior day, unless this day falls on a weekend or holiday then the distribution will be made the next business day.

Note: Systematic distributions to an eligible educational institution must be sent by check.

Step 1: Distribution allocation(s)

Fund number	Account number	Dollar amount	Annualized Percentage
<div><div></div><div></div><div></div><div></div></div>	— <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	\$ <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	or <div><div></div><div></div><div></div></div> %
<div><div></div><div></div><div></div><div></div></div>	— <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	\$ <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	or <div><div></div><div></div><div></div></div> %
<div><div></div><div></div><div></div><div></div></div>	— <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	\$ <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	or <div><div></div><div></div><div></div></div> %
<div><div></div><div></div><div></div><div></div></div>	— <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	\$ <div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	or <div><div></div><div></div><div></div></div> %

Step 2: Distribution frequency

Choose a frequency below. Putnam will default to once per year if no option is selected:

Frequency: ☐ Distribute every month (enter distribution date(s) below) **or** ☐ Distribute only in the month(s) chosen below:
☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ June ☐ July ☐ Aug ☐ Sept ☐ Oct ☐ Nov ☐ Dec

Begin my systematic distribution(s) on the following date(s):

Distribution date:	Additional distribution date: (Use if you wish to distribute multiple times within a month)
(MM/DD)	(DD)
<div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div></div>

Section 6 Authorization

Putnam requires the signature guarantee/medallion guarantee for any of the scenarios listed below. A signature guarantee/medallion guarantee is a stamped assurance by a financial institution that indicates a signature is valid and has the financial backing of the institution.

- 1) distribution is sent electronically to a bank account

2) check is not payable to the registered owner or to an eligible educational institution for the benefit of the beneficiary

3) distribution amount is more than \$250,000

4) check is mailed to an address not on file with Putnam
- 5) check is mailed to an address that has been added or changed in the past 15 days

6) request is signed by anyone other than the registered account owner (must be **signed in capacity** and accompanied by the appropriate **certified legal document(s) with original certification**; some restrictions may apply)

I request the distribution indicated above. Putnam Investments, the State of Nevada, the Nevada College Savings Trust Fund and the Board of Trustees of the College Savings Plans of Nevada are entitled to rely on this request and are released from any and all claims I may have or hereafter claim to have with respect to the distribution. I certify that both my Social Security number and that of the beneficiary, set forth in Section 1 is true, correct and complete and that the numbers are our Taxpayer Identification Numbers (TIN).

I authorize the bank/credit union to accept credit entries initiated by Putnam Investor Services, Inc. to the account designated in Section 4, and to credit the same account, without responsibility for correctness thereof or for the existence of any further authorization relating thereto. I agree to indemnify and hold harmless my bank/credit union, the Putnam Investment Options, Putnam Investor Services, Inc., the State of Nevada, the Nevada College Savings Trust Fund and the Board of Trustees of the College Savings Plans of Nevada for any loss, liability or expense incurred from acting on these instructions. I also agree to waive any right under the NACHA rules to rescind any instruction for ACH transactions which have already occurred at the time of the attempt to rescind. This waiver of the rescission right applies to ACH liquidations from the Putnam funds. This authorization may be terminated by me at any time by written notification to Putnam Investor Services, Inc. with reasonable time given to implement my request.

Signature of account owner or authorized party

Print name of signer

Date (mm/dd/yyyy)

PLACE SIGNATURE/MEDALLION GUARANTEE STAMP BELOW
THE GUARANTEE SHOULD NOT BE DATED



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.

