



Coverdell Education Savings Account Transfer of Assets and/or Change of Beneficiary Request Form

- Please use this form when transferring your existing Coverdell Education Savings Account (Coverdell ESA) to Fiduciary Trust International of the South ("FTIOS") as Custodian. **You will also need to complete a *Coverdell Education Savings Account Application* if you have not already done so.**
- This form may also be used to change the beneficiary on your Coverdell ESA (the beneficiary must be under age 30). Please contact your current Coverdell ESA Custodian to verify whether any other form is necessary to complete this transfer and/or redesignation of beneficiary.

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 ACCOUNT INFORMATION

First name	M.I.	Last name	Suffix	SSN/ITIN	Date of birth (mm/dd/yyyy)
Street address of residence (no P.O. Box address)		City	State		ZIP

First name	M.I.	Last name	Suffix	SSN/ITIN	Primary phone number
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2 CONTACT INFORMATION FOR CURRENT COVERDELL ESA CUSTODIAN/TRUSTEE

Please provide contact information for the current Coverdell ESA custodian/trustee below.

Current Custodian/Trustee name		Phone number	
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Street address	City	State	ZIP
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3 TRANSFER INSTRUCTIONS

NAME OF MUTUAL FUND OR INVESTMENT TRANSFERRING FROM	ACCOUNT NUMBER		AMOUNT		PERCENTAGE
		<input type="checkbox"/> Balance <input type="checkbox"/> Partial	\$	OR	%
		<input type="checkbox"/> Balance <input type="checkbox"/> Partial	\$	OR	%
		<input type="checkbox"/> Balance <input type="checkbox"/> Partial	\$	OR	%
		<input type="checkbox"/> Balance <input type="checkbox"/> Partial	\$	OR	%

NOTE: All amounts to be transferred should be redeemed (liquidated) except for Franklin Templeton fund shares, which shall be transferred-in-kind.

4 INVESTMENT INSTRUCTIONS

Please indicate the allocation for your transfer, providing the amount to be invested in each fund (\$) or the percentage of the total allocation (%). If the account(s) identified in this section does not currently exist, a new application must accompany this request form.

- **The total minimum investment amount is \$250.00 for each fund.**
- Please specify the exact fund name.
- If no dollar amount or percentage is provided, your investment will be apportioned equally among the funds indicated below.
- The total dollar amount or percentage must equal 100% of your investment.

FRANKLIN TEMPLETON FUND NAME	ACCOUNT NUMBER	ALLOCATION AMOUNT	PERCENTAGE
		\$	OR %
		\$	OR %
		\$	OR %
		\$	OR %
TOTAL:		\$	OR 100%

5 **BENEFICIARY DESIGNATION (if applicable)****THE PRIMARY BENEFICIARY SHALL BE REDESIGNATED TO** (must be under age 30 or a Special Needs Beneficiary):

First name	M.I.	Last name	Suffix	SSN/ITIN	Date of birth (mm/dd/yyyy)	
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		<input type="checkbox"/> U.S. citizen or resident alien <input type="checkbox"/> Nonresident alien			
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If a Special Needs Beneficiary,¹ check this box: ☐**THE CONTINGENT BENEFICIARY SHALL BE REDESIGNATED TO** (should the Primary Beneficiary fail to reach age 30):

First name	M.I.	Last name	Suffix	SSN/ITIN	Date of birth (mm/dd/yyyy)	
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		<input type="checkbox"/> U.S. citizen or resident alien <input type="checkbox"/> Nonresident alien			
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6 **RESPONSIBLE INDIVIDUAL'S SIGNATURE**I am (check one) ☐ **A PARENT** ☐ **THE LEGAL GUARDIAN** of the above-named Beneficiary ("Beneficiaries" if redesignated).**Please accept this as your authorization to:**

- (1) transfer the amount indicated above from the referenced Coverdell ESA
- (2) if applicable, make check(s) payable to "FTIOS Coverdell ESA FBO (Named Beneficiary) – TRANSFER"
- (3) send check to Fiduciary Trust International of the South ("FTIOS") as provided in Section 7 and/or
- (4) change the beneficiary of the referenced Education Savings Account to the individual designated in Section 5

RESPONSIBLE INDIVIDUAL SIGNATURE ONLY**The responsible individual named in Section 1 must sign below.**

X	Date
Signature	

SIGNATURE GUARANTEE OR MEDALLION GUARANTEE STAMP:
(If required by the current custodian/trustee, not required by FTIOS)

A signature may be 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.

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT: ☐ Me ☐ My financial professional

Financial professional name	Phone number of financial professional
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1. Special Needs Beneficiary is defined in section 1.05 of the Account Agreement.

Fiduciary Trust International of the South ("FTIOS") hereby accepts the transfer of assets as requested herein as Custodian of a Coverdell ESA for benefit of the Beneficiary corresponding to the instructions provided in Section 4. This acceptance extends only to cash and to Franklin Templeton Fund shares. Please mail the check with a copy of this request to one of the addresses listed below.

Authorized Signature—Fiduciary Trust International of the South:

x 

Craig Richards, President, CEO and Chairman of the Board

BEFORE YOU SUBMIT...

DID YOU PROVIDE?

- ☐ A typed or handwritten form 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

Information for the Beneficiary on the account:

- ☐ Full first and last name
- ☐ Social Security Number/ITIN
- ☐ Date of Birth

Information for the Responsible Individual authorized to transact business on the account:

- ☐ Full first and last name
- ☐ Social Security Number/ITIN

SECTION 2

- ☐ Contact information for the current Custodian/Trustee

SECTION 3

- ☐ Account number(s) at the current institution

SECTION 4

- ☐ Fund name(s) and share class (if Class C selected, Broker-Dealer is required)
- ☐ Dollar amount or percentage(s) equal to 100%

SECTION 6

- ☐ The signature of the Responsible Individual and date signed

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.Sender's email address MUST match the email address on file, or the email MUST include a related case number(s) to be accepted.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.If you have not been registered on franklintempleton.com for at least 15 calendar days, call (800) 527-2020 to request a case number to reference in your email. <p>Financial Professionals: ftrequests@franklintempleton.com</p> <p>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 P.O. Box 997153 Sacramento, CA 95899-7153Franklin Templeton P.O. Box 33033 St. Petersburg, FL 33733-8033 <p>Overnight</p> <ul style="list-style-type: none">Franklin Templeton 3344 Quality Drive Rancho Cordova, CA 95670-7313Franklin Templeton 100 Fountain Parkway N. St. Petersburg, FL 33716-1205

Not FDIC Insured | May Lose Value | No Bank Guarantee