

# Franklin Templeton Roth Conversion Request Form

Use this form to convert your Traditional IRA, SIMPLE IRA or SEP IRA to a Roth Conversion IRA with Franklin Templeton Bank & Trust (FTB&T) as Custodian. If you do not have an existing FTB&T Roth IRA, you must attach a completed Franklin Templeton IRA Application with this form. If FTB&T is not the custodian of your IRA, please contact your current IRA custodian to determine whether any other form is necessary to complete this transaction.

For assistance, please contact your financial advisor or call Franklin Templeton Retirement Services at (800) 527-2020.

71				, ,		
1 ACCOUNT OWNER INFORMATION						
First name M.I. Last na	me	Suff	ix Date of birth (mi	m/dd/yyyy) SSN/TIN		
2 CURRENT IRA CUSTODIAN/TRUSTEE						
	LIDA GERRIDA E		C ID A			
TYPE OF IRA YOU ARE CONVERTING: TRADITIONAL	_	_ SIMPL	EIRA			
IF FTB&T IS NOT THE CUSTODIAN OF THE ACCOUNT, PLEASE C	OMPLETE THE FOLLOWING.			Dhana numbar		
Custodian name			Phone number			
Address	City			State ZIF	)	
2 DISTRIBUTION (CONVERGION) INSTRUCTION	10					
DISTRIBUTION (CONVERSION) INSTRUCTION	15					
NAME OF MUTUAL FUND OR INVESTMENT TRANSFERRING FROM FUND-ACC	OUNT NUMBER			AMOUNT		PERCENTAGE
	OOK! NOMBER		☐ Balance ☐ Pari	1.	OR	%
			l □ Balanaa □ Baw	+:! <b>c</b>	OR	%
			☐ Balance ☐ Par		UK	/0
			☐ Balance ☐ Par	tial \$	OR	%
			☐ Balance ☐ Par	tial <b>\$</b>	OR	%
SPECIAL INSTRUCTIONS FOR BANK CERTIFICATES OF DEPOSIT	(CDc).					
□ Do not process this transfer request until my CDs mature	1		(2)	(3)		
	[					
4 INVESTMENT INSTRUCTIONS						
• You must have an existing Roth IRA or attach a co			Application. For e	xisting Roth IRA owr	ners, if r	no account
number is provided, the investment will be made into			. 6 . 1			
<ul> <li>Please refer to the enclosed fund listing for a list of i</li> <li>If a share class is not specified, investments will be r</li> </ul>	-			and Class 7 on Admins	Cl.	ala a u a a a a a a a a a a a a a a a a
"Class Z" or "Advisor Class" next to the fund name.	nade into Class A snares.	. Ir you ar	e eligible to purch	ase Class Z of Adviso	or Class	snares, write
• If allocation amount or percentage is not specified,	the investment will be div	vided equa	ally among the fur	nds listed.		
• The minimum initial investment for each fund is \$2	50.					
FRANKLIN TEMPLETON FUND NAME OR EXISTING ACCOUNT N	JMBER		ASS (check one)	ALLOCATION AMOUNT	1	PERCENTAGE
		□ A □	С	\$	OR	%
		□ A □	C	\$	OR	%
I		□ A □	C	<b> </b> \$	OR	%
				1		
		□ A □	C	\$	OR	%

(continued)

100%

TOTAL

# 5 AUTHORIZING SIGNATURE

I have established a Roth IRA with Franklin Templeton Bank & Trust (FTB&T). Please accept this as your authorization to: (1) distribute the amount(s) indicated above from my Traditional IRA, SIMPLE IRA or SEP IRA to my Roth Conversion IRA, (2) make check(s) payable to "FTB&T ROTH CONVERSION FBO (My Name)," and (3) send check(s) to FTB&T as provided in Section 6.

I elect no Federal tax withholding. (You may choose Federal tax withholding by crossing out "no" in the preceding sentence.) I understand that penalties under the estimated tax payment rules may apply if my payments of estimated tax and withholding, if any, are not adequate.

I understand that the amount distributed, excluding any nondeductible contributions, shall be taxable to me. I also understand that distributions made within five calendar years of the establishment of my Roth Conversion IRA may be subject to a 10% penalty tax. I certify that none of the assets to be rolled over to my Roth Conversion IRA include any required minimum distribution amounts under IRC Section 401(a)(9) for the current year.

	Date
X	
Account Owner Signature	

<b>SIGNATURE GUARANTEE:</b> (if required by the current custodian; not required by FTB&T)					
ordinarione dominarione by the current education, not required by the					

#### IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT ME AT:

Daytime phone number	Evening phone number
( )	( )

# 6 FRANKLIN TEMPLETON BANK & TRUST ACCEPTANCE

Franklin Templeton Bank & Trust (FTB&T) hereby accepts the distribution of IRA assets as requested herein, which upon receipt will be converted to a Roth Conversion IRA for the Account Owner. This acceptance extends only to cash and Franklin Templeton Fund shares. Please send the check(s) with a copy of this request to one of the addresses listed below.

Authorized Signature—Franklin Templeton Bank & Trust: X

# Michael Mee, President

# Before you submit...

#### **SECTION 1**

Did you provide your name, date of birth and SSN/TIN?

#### **SECTION 2**

Did you indicate the plan type you are converting?

#### **SECTION 3**

Did you provide the account number(s) and amount(s) for conversion?

### **SECTION 4**

- Did you specify the Investment Instructions with allocation?
- If applicable, did you attach a completed Franklin Templeton IRA Application?

#### **SECTION 5**

Did you sign the form?

Please mail to WEST COAST		EAST COAST		
	Franklin Templeton Investments P.O. Box 997153 Sacramento, CA 95899-7153	Franklin Templeton Investments P.O. Box 33033 St. Petersburg, FL 33733-8033		
Overnight	3344 Quality Drive Rancho Cordova, CA 95670-7313	100 Fountain Parkway St. Petersburg, FL 33716-1205		

NOT FDIC INSURED | MAY LOSE VALUE | NO BANK GUARANTEE