



IRA Transfer/Rollover Request Form

IMPORTANT INFORMATION:

- Use this form to request a transfer or direct rollover of retirement assets held at another institution to an IRA with Fiduciary Trust International of the South ("FTIOS") as Custodian.
- Only designated Roth assets can be transferred to a Roth IRA. If you intend to convert a non-Roth account (e.g., Traditional IRA) to a Roth IRA or Roth Conversion IRA, do not use this form because this will result in a taxable event. Instead, please use the *Roth Conversion Request Form* available at franklintempleton.com.
- If you intend to directly roll over after-tax contributions (e.g., designated Roth contributions) to a Roth Conversion IRA (or Roth IRA) and the pre-tax portion of your plan to a Rollover IRA (or Traditional IRA), please complete two separate forms and ensure clear instructions regarding the handling of your pre-tax and after-tax portions are provided to your plan administrator or employer.
- Beneficiary Required Minimum Distribution (RMD) information:** To establish systematic withdrawals to satisfy your RMD, complete a *Beneficiary Transfer/Distribution Request Form* available at franklintempleton.com.

TO TRANSFER RETIREMENT ASSETS HELD AT ANOTHER INSTITUTION TO FTOIS

- Complete this form in its entirety. (A separate form must be completed for each plan type).
- Include a copy of your most recent account statement from the current institution for each account.
- Original documents are often preferred by the current custodian; we recommend you mail completed documentation to the address listed on this form.

CURRENT INSTITUTION REQUIREMENTS

- Missing requirements may delay or prevent the transfer from initiating. To expedite your request, check with the CURRENT INSTITUTION for any other requirements or documents, such as:
 - Liquidation of assets
 - Outstanding transfer fees (exit fees) that may be owed
 - Other mandatory documents or forms
 - Signature Guarantee/STAMP Medallion

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

If applicable, provide any Franklin Templeton REFERENCE ID(S) related to your request: _____

1 ACCOUNT OWNER INFORMATION

First name	M.I.	Last name	Suffix	SSN/ITIN	Date of birth (mm/dd/yyyy)
<input type="text"/>					

Email address ¹	Primary phone number	Alternate phone number
<input type="text"/>	(<input type="text"/>) <input type="text"/>	(<input type="text"/>) <input type="text"/>

2 TRANSFER/ROLLOVER INSTRUCTIONS

Identify the type of account you intend to transfer/roll over (**FROM CURRENT INSTITUTION**) and the type of Franklin Templeton IRA retirement plan into which the funds are to be invested (**TO FRANKLIN TEMPLETON**).

- In addition to this form, you will need to complete the application for the type of Franklin Templeton IRA retirement plan into which the funds are to be invested. (If an FTOIS account is already registered in the account owner's name with the same plan type, then an application is not required).
- Roth assets are not eligible for rollover treatment to a SIMPLE IRA or SEP IRA.

- SIMPLE IRAs may only be transferred or rolled over to another type of IRA after its 2-year period. SIMPLE IRAs may only accept transfers or rollovers from another type of IRA after its 2-year period. The 2-year period begins on the first day on which your employer deposits contributions in your SIMPLE IRA. Before two years, you may only transfer or roll over to another SIMPLE IRA.

FROM CURRENT INSTITUTION

Transfer from:

- Traditional IRA or Rollover IRA
- Roth IRA
- Roth Conversion IRA
- SIMPLE IRA *within* its 2-year period
- SIMPLE IRA *after* its 2-year period
- SEP IRA
- SARSEP IRA

Rollover from:

- 401(k)
- Profit Sharing (*with no salary deferral option*)
- Money Purchase Pension Plan
- 403(b)
- Other (specify) _____

TO FRANKLIN TEMPLETON

Transfer/Rollover to:

- Traditional IRA
- SIMPLE IRA
- Rollover IRA
- SEP IRA
- Roth IRA
- SARSEP IRA
- Roth Conversion IRA

INHERITED BENEFICIARY INFORMATION

The above-checked IRA has been (or is being) opened as an "**Inherited IRA**" by the beneficiary of the original participant.

Please provide a copy of the death certificate.

Complete the information below:

Name of decedent

First name	M.I.	Last name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Relationship to Beneficiary: Spouse Non-Spouse

1. 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.

INVESTMENT ALLOCATION (cont'd.)

Invest the transfer or rollover proceeds in my existing account(s) as indicated below:

FUND NUMBER	ACCOUNT NUMBER	DOLLAR AMOUNT	PERCENTAGE
		\$	OR %
		\$	OR %
		\$	OR %

Invest the transfer or rollover proceeds in accordance with the fund selection provided in the attached Franklin Templeton *IRA Application* or *SIMPLE IRA/SEP IRA Application*.

I have an existing Franklin Templeton account, but would like my transfer or rollover proceeds directed to the fund selection(s) and share class listed below.

FUND NUMBER OR TICKER	FUND NAME (List the full name of the fund)	SHARE CLASS	DOLLAR AMOUNT	PERCENTAGE
			\$	OR %
			\$	OR %
			\$	OR %
			\$	OR %
			\$	OR %
			\$	OR %
			\$	OR %

IF YOU WOULD LIKE TO INVEST IN ADDITIONAL FUNDS, PROVIDE THE INFORMATION ON A SEPARATE SHEET.

SIGNATURE

I have established an IRA (as indicated in Section 2) with Fiduciary Trust International of the South ("FTIOS"). Please accept this as your authorization to transfer/roll over the assets specified in Sections 4 and 5 to FТИOS, as custodian for my IRA. If any of the assets listed are currently invested in Franklin Templeton fund shares, I authorize that they be transferred/rolled over in kind, not redeemed. I certify that none of the assets to be transferred/rolled over include any minimum required distribution amounts under IRC Section 401(a)(9) for the current year.

I have previously completed or am including a Franklin Templeton *IRA Application* or *SIMPLE IRA/SEP IRA Application*.

FRANKLIN TEMPLETON ACCOUNT OWNER SIGNATURE ONLY

The registered owner named in Section 1 must sign below.

X
Signature

Date

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

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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FOR RESIGNING CUSTODIAN/TRUSTEE ONLY

NOTE: All amounts to be transferred/rolled over should be sold (liquidated) except for Franklin Templeton fund shares, which shall be transferred/rolled over in kind.

Fiduciary Trust International of the South ("FTIOS") hereby accepts the transfer or rollover of assets requested herein as custodian for the type of IRA shown in Section 2 for benefit of the account owner. This acceptance extends only to cash and Franklin Templeton fund shares.
Please make the check(s) (if applicable) payable to FТИOS custodian for (IRA type from Section 2) of (account owner's name)—"Transfer"/"Rollover" and mail the check(s) 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 Account Owner authorized to transact business on the account:

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

SECTION 2

Type of account into which the transfer or rollover will be invested

Note: If requesting a rollover from a 401(k), 403(b), Profit Sharing or Money Purchase Plan, please contact the plan trustee regarding additional forms that may be needed to complete the rollover.

SECTION 3

- Contact information for the current trustee or custodian of your retirement plan

SECTION 4

- Account number(s) at the current institution

SECTION 6

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

SECTION 7

- The signature of the Account Owner 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 reference ID(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/accessible 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 reference ID(s) to include in your email. <p>Financial Professionals: ftrequests.us.franklintempleton@fisglobal.com Shareholders: shrequests.us.franklintempleton@fisglobal.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 33033 St. Petersburg, FL 33733-8033 <p>Overnight</p> <ul style="list-style-type: none"> • Franklin Templeton 100 Fountain Parkway N. St. Petersburg, FL 33716-1205