Franklin Templeton **Qualified Plan Transfer Request Form**



Franklin · Templeton · Mutual Series

Please use this form when transferring a Profit Sharing or Money Purchase Pension Plan from your current trustee to Franklin Templeton Bank & Trust. If you have not already enrolled in your employer's Franklin Templeton Profit Sharing or Money Purchase Pension Plan, please complete a Profit Sharing or Money Purchase Pension Plan Participant Application.

| 1 PARTICIPANT INFORMATION | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| First name M.I. Last name | Date of birth (mm/dd/yyyy) SSN |
| Street address of residence (no P.O. Box Address) City | State ZIP |
| Daytime phone number Evening phone number | Current employer (name of business) |
| () | |
| 2 THIS IS A TRANSFER FROM: | |
| Current trustee's name | Daytime phone number |
| Street address City | State ZIP |
| TYPE OF QUALIFIED RETIREMENT PLAN (check one): PROFIT SHARING PLAN | AN |
| Name(s) of mutual fund investment(s) and/or other investment(s) According | unt numbers |
| | |
| Please attach a copy of a recent account statement. | |
| 3 TRANSFER INSTRUCTIONS | |
| CHECK OR COMPLETE ALL THAT APPLY: | |
| $\hfill\Box$ Please liquidate and transfer in cash to Franklin Templeton Bank & Trus | t as Trustee |
| □ all or □ part (% or \$) of my investments listed | in Section 2 above immediately or \square at maturity/ |
| $\hfill\square$ Please transfer all my Franklin Templeton mutual fund shares, if any, (in | kind) to Franklin Templeton Bank & Trust as Trustee. |
| These shares are in Account Number(s) | |
| Note to current Trustee: Please send Franklin Templeton any outstanding co | ertificates and written authorization to re-register these shares. |
| Note: These accounts must be held under the same qualified Plan type as ref containing no after-tax contributions, unless otherwise specified in writing | |

(continued)

| Please refer to the er | nclosed fund listing of investment choices. P | lease specify the exact fund name. | |
|---------------------------|----------------------------------------------------------------------------------------|-------------------------------------------------|---------------------------------------------|
| Invest the transferre | d assets in the following: | | |
| FRANKLIN TEMPLETON | FUND NAME | ACCOUNT NUM | BER (IF AVAILABLE) PERCENTAGE ¹ |
| | | | % |
| | | | % |
| | | | % |
| | | | % |
| | | | |
| Note: These seems | to moved be senden the same Diantemas as in di | and in Section 2 | TOTAL 100% |
| | ts must be under the same Plan type as indi | cated in Section 2. | |
| 5 AUTHORIZING | G SIGNATURE | | |
| | iness Retirement Plan with Franklin Temple lentified in Section 2 above to FTB&T in th | | |
| | | Date | |
| X | | | |
| Participant's Signature | 2 | | |
| SIGNATURE GUARANT | TEE (IF REQUIRED BY THE CURRENT TRUSTEE) | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| v | | Date | |
| X Employer's Signature | | | |
| Note: To complete t | this transfer, your current trustee may requir | re a separate letter of instruction, a signatur | re guarantee, passbook or annuity |
| | them about additional requirements. | a separate terret of moraeron, a segunda. | e guarantee, passeoon or unitary |
| 6 FRANKLIN TE | MPLETON BANK & TRUST ACCEPTANCE | | |
| | | | |
| | Bank & Trust hereby accepts, as Trustee, the Templeton Fund shares. Please make the c | | |
| name)" and reference | ce the Plan type indicated in Section 2 (on re | everse side). Please send the Participant a cle | osing statement. |
| | | | |
| | | AIE | |
| | Wen | dy d. Duyt | |
| Authorized Signature- | -Franklin Templeton Bank & Trust: X | | |
| | Wendy L. | Harrington, President & CEO | |
| | | | |
| Please mail to | WEST COAST | EAST COAST | OVERNIGHT ADDRESS |
| | Franklin Templeton Bank & Trust, F.S.B. | Franklin Templeton Bank & Trust, F.S.B. | Franklin Templeton Bank & Trust, F.S.B |

| Franklin Templeton Bank & Trust, F.S.B. | Franklin Templeton Bank & Trust, F.S.B. | Franklin Templeton Bank & Trust, F.S.B. |
|-----------------------------------------|----------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| P.O. Box 997153 | c/o Retirement Services P.O. Box 33033 St. Petersburg, FL 33733-8033 | c/o Retirement Services 3344 Quality Drive Rancho Cordova, CA 95670-7313 |

 $1. \ \ \text{If not specified, investments will be divided equally among funds listed.}$

4 INVESTMENT INSTRUCTIONS