

# Putnam 529 for America<sup>SM</sup> corporate systematic investment application



**Return by mail:**  
Putnam 529 for America  
Putnam Investor Services, Inc.  
P.O. Box 8383  
Boston, MA 02266-8383

**Return by express delivery:**  
Putnam Investor Services, Inc.  
30 Dan Road  
Canton, MA 02021-2809

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



Use this form to establish systematic contributions to a new or existing Putnam 529 for America account. **Important:** If contributions are to be made to an existing account, this form will not update that account with respect to the information in Sections 1, 2, 3, or 4. Please contact Putnam to update the information in these sections for your existing account.

## Section 1 Account owner information

Name of owner

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

A 529 UTMA/UGMA account can **only** be opened with assets from an existing UTMA/UGMA account of the same beneficiary. Money placed in an UTMA/UGMA registration represents an irrevocable gift to the minor and cannot be combined with other 529 plan types. Check the box below and indicate the applicable donor state **only** if you are establishing this account with contributions from an existing UTMA/UGMA account of the same beneficiary.

Contributions to this account are from an existing UTMA/UGMA account from the donor state of \_\_\_\_\_ .

Contact phone number

E-mail address

**Note:** Providing an e-mail address and/or phone number above will replace the current contact information on file with Putnam (if applicable). No changes will be made for fields that are left blank. If you are enrolled in electronic delivery, all notifications will be sent to the e-mail address listed above.

### Electronic delivery of account documents

I want to **"GO GREEN"** and reduce paper, printing and mailing by receiving documents electronically.

By checking the "GO GREEN" box above, an e-mail will be sent to the e-mail address provided above with a link to Putnam's secure Investor Website, which will allow you to choose your eDelivery options. Documents available for eDelivery include transaction confirmations, quarterly statements, prospectuses, annual/semiannual fund reports, proxy statements, and tax forms. When a new document is available, instead of sending the document to you by U.S. mail, Putnam Investor Services will send you an e-mail notification that the document is available via Putnam's Website. Terms and Conditions related to eDelivery will be provided to you prior to confirmation of your elections.

Mailing address (required)

Street

City	State	ZIP code

Owner's residential address (Required if mailing address is a P.O. Box or c/o address)

Street

City	State	ZIP code

## Section 2 Designate a successor owner

The successor owner will become the owner of the account in the event of the account owner's death. The successor owner cannot be the same person as the account owner.

Name of successor owner

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

### Section 3 Beneficiary information

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Please list all new beneficiaries for which you wish to contribute via payroll deduction. The beneficiary is the person whose qualified higher education expenses may be paid from the account. Note: you must complete date of birth for each beneficiary below. **If you designate more than one beneficiary, a separate Putnam 529 for America account will be established for each and this application will apply to each account.**

Name of beneficiary

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

Beneficiary's address (Required if different than account owner's mailing address)

Street

City	State	ZIP code

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Name of beneficiary

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

Beneficiary's address (Required if different than account owner's mailing address)

Street

City	State	ZIP code

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Name of beneficiary

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

Beneficiary's address (Required if different than account owner's mailing address)

Street

City	State	ZIP code

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Name of beneficiary

First	MI	Last	Suffix	Social Security number (required)	Date of birth (mm/dd/yyyy; required)

Beneficiary's address (Required if different than account owner's mailing address)

Street

City	State	ZIP code

## Section 4 Provide information about your financial advisor

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Dealer number

Branch office number

Financial advisor number

CRD number

Financial advisor name(s) exactly as it appears on firm's registration

Financial advisor's firm

Financial advisor's contact phone number

Branch office street address

City

State

ZIP code

**Note:** If you do not designate a financial advisor, or if the broker-dealer firm you designate does not have a selling agreement with the distributor, Putnam Retail Management Limited Partnership ("PRM"), PRM will be designated as the default broker-dealer firm of record on your account and PRM will retain all applicable sales charges. You may designate another broker-dealer firm at any time by returning a signed Change of financial advisor form to Putnam Investor Services.

## Section 5 Employer information

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Name of company

Putnam group number

**Mailing address**

Street

City

State

ZIP code

## Section 6 Investment options

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Please use the Putnam Fund Guide (<https://www.putnam.com/literature/pdf/FM103.pdf>) to indicate your investment options in Section 7.

- For new investments made to Putnam: If no class of shares is indicated, class A shares will be purchased.
- Accounts established for beneficiaries 15 years of age or older are not eligible for fee structure B.
- If you are transferring shares held in The Putnam funds to a new ownership registration with Putnam, you must select the same share class as the original account.

<sup>1</sup>Money market funds are not insured or guaranteed by the Federal Deposit Insurance Corporation (FDIC) or any other governmental agency. Although the fund seeks to maintain a constant share price of \$1.00, it is possible to lose money by investing in this fund. Money market Class B share accounts are not available for direct purchases.

\*Beneficiaries over the age of 21 requesting an Age-Based Option will be invested into Putnam's Graduate fund.

## Section 7 Select your account features

### Section 7A — Bank account information (You **must** provide a voided check or deposit slip; starter checks are **not** acceptable)

**Note:** Starter checks, brokerage checks, and checkwriting checks will not be accepted.

Please provide your bank information to allow subsequent purchases to be sent from your bank account. If the Putnam account owner's name is listed in the bank account registration, you will then be eligible for ACH on-demand purchasing via phone or web.

Attach a preprinted or web-generated voided check/deposit slip or a signed letter from the bank on bank letterhead below. Each of these documents must include: bank name, name(s) as registered on the bank account, routing number and account number.

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

Please use my enclosed investment check to establish bank account options on my account in lieu of other acceptable documents named above.

tape your document here

Name Address City, State, ZIP	DATE _____
PAY TO THE ORDER OF _____	\$ <input style="width: 50px;" type="text"/>
_____ DOLLARS	
memo: _____	
: 123456789	: 000123456789
: 101	

ABA routing number of financial institution

Bank account number

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### Section 7B — Systematic Investment plan

Complete this section to establish a new systematic investment plan using the bank account information provided above. Please indicate the investment option, share class, dollar amount, frequency and date for your investments below. Putnam requests the draft from your bank account on the business day prior to the investment date. **If no date is selected, Putnam will default to the 15th. If no frequency is selected, Putnam will default to every month.** If the investment date falls on a weekend or a holiday, the investment will be made the next business day. If the investment date falls on a date that does not occur within a particular month (29th-31st), the investment will be made the prior day, unless this day falls on a weekend or holiday then the investment will be made the next business day.

#### Step 1: Investment allocation

**Fee structure**     A     B     C

Name of beneficiary

First	MI	Last	Suffix	Investment option	Dollar amount
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					\$ <input style="width: 50px;" type="text"/>
					\$ <input style="width: 50px;" type="text"/>
					\$ <input style="width: 50px;" type="text"/>
					\$ <input style="width: 50px;" type="text"/>
					\$ <input style="width: 50px;" type="text"/>

#### Step 2: Option frequency

Choose a frequency below:

Frequency:     Invest every month (enter investment date(s) below)    **or**     Invest only in the month(s) chosen below:

Jan     Feb     Mar     Apr     May     June     July     Aug     Sept     Oct     Nov     Dec

Indicate draft date(s):

Investment date:    Additional investment date: (use if you wish to invest multiple times within a month)  
 (MM/DD)    (MM/DD)

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## Section 8 Authorize Putnam to open your account

I do not authorize telephone redemptions. Accept only written instructions signed by me.

Unless I have checked the box above, Putnam Investor Services, Inc. is authorized to act upon redemption instructions received by telephone from me or any other person claiming to act as my representative who can provide Putnam with my account registration and address as it appears on Putnam's records. Redemption proceeds of up to \$100,000 will be sent to me at an address on record with Putnam for at least 15 days. Putnam will not be liable for unauthorized transactions if it employs reasonable procedures to confirm that instructions received by telephone are genuine. I agree to indemnify and hold harmless Putnam Investor Services, Inc., the State of Nevada, the Nevada College Savings Trust Fund, the Board of Trustees of the College Savings Plans of Nevada and the Putnam Investment Options against any claim or loss in connection with any telephone transaction effected on my account.

I do not authorize the mailing of only one annual report, one offering statement, or one set of proxy materials for all accounts in a Putnam investment option at my address. Send a separate copy for every account.

Unless I have checked the box above, Putnam Investor Services, Inc. is authorized to send only one annual report, one offering statement, or one set of other investor documents for all accounts in any Putnam investment option at my address.

**Important notice regarding Putnam's privacy policy: By signing this application, I acknowledge that Putnam's privacy policy is available for viewing and printing via Putnam's website at <https://www.putnam.com/policies/>**

If I/we have completed the bank account information section, I/we authorize my/our bank/credit union to accept credit entries initiated by Putnam Investor Services, Inc., to my/our account and to credit, as requested, the same to my account, without responsibility for correctness thereof or for the existence of any further authorization relating thereto. I/we also authorize my/our bank/credit union to accept debit entries initiated by Putnam Investor Services, Inc., to reverse or otherwise correct any erroneous credit to my/our bank/credit union account. I agree to indemnify and hold harmless my bank/credit union, 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/we also agree to waive any right under the NACHA Rules to rescind any instruction for ACH transactions that have already occurred at the time of the attempt to rescind. This waiver of the rescission right applies to both ACH investments in and ACH redemptions from the Putnam funds. This authorization may be terminated by me/us at any time by written notification to Putnam Investor Services, Inc., with reasonable time given to implement my/our request. Putnam Investor Services, Inc. may amend or terminate this agreement at any time. You will be notified before any such changes go into effect. For bank account information, Putnam does not assess a fee for federal bank wire and/or ACH transactions on your account(s). Some banks/credit unions may not offer ACH transactions or may charge a fee to conduct such transactions. Please check with your financial institution for information regarding eligibility, fees and applicable routing number(s) for federal bank wire and/or ACH transactions.

I certify that the information contained herein is true and correct. I, the successor owner, and the beneficiary(ies) are U.S. Citizens or resident aliens. I certify that the taxpayer identification numbers in Sections 1 and 3 are correct (or a number has been applied for and will be provided upon receipt). I certify that my systematic contributions are not rollover contributions of proceeds from a Coverdell Education Savings account, a qualified U.S. Savings Bond (under Sec. 135(c)(2)(C) of the Internal Revenue Code) or another qualified tuition program.

I acknowledge that investments in the Putnam 529 for America program are not mutual funds; are not deposits or obligations of, or guaranteed or endorsed by the State of Nevada, the Nevada College Savings Trust Fund, the Board of Trustees of the College Savings Plans of Nevada, Putnam Investments, or any financial institution; are not insured by the Federal Deposit Insurance Corporation (FDIC), the Federal Reserve Board, or any other agency; and involve risk, including the possible loss of principal.

I understand and acknowledge that any systematic purchases or other contributions are not deductible from federal income tax.

**BY SIGNING BELOW, I AM AGREEING TO THE TERMS OF THE OFFERING STATEMENT, PARTICIPATION AGREEMENT ATTACHED TO THE OFFERING STATEMENT, AND THE TERMS OF THIS APPLICATION. I UNDERSTAND THAT I SHOULD CONSULT A FINANCIAL OR LEGAL ADVISOR IF I HAVE ANY QUESTIONS ABOUT THE TERMS AND CONDITIONS OF THIS AGREEMENT.**

**MY SIGNATURE BELOW INDICATES I HAVE READ THE OFFERING STATEMENT AND PARTICIPATION AGREEMENT FOR THE PUTNAM 529 FOR AMERICA PROGRAM AND AGREE TO THE TERMS THEREIN AND HEREIN. THIS APPLICATION, TOGETHER WITH THE PARTICIPATION AGREEMENT INCORPORATED HEREIN, CONSTITUTES MY CONTRACT WITH THE STATE OF NEVADA, THE NEVADA COLLEGE SAVINGS TRUST FUND AND THE BOARD OF TRUSTEES OF THE COLLEGE SAVINGS PLANS OF NEVADA WITH RESPECT TO AMOUNTS INVESTED PURSUANT TO THIS APPLICATION. TO THE EXTENT MORE THAN ONE BENEFICIARY WITHOUT AN EXISTING ACCOUNT IS DESIGNATED IN SECTION 3, I AGREE THAT A SEPARATE ACCOUNT WILL BE ESTABLISHED FOR EACH SUCH BENEFICIARY AND THIS APPLICATION WILL CONSTITUTE A SEPARATE CONTRACT WITH RESPECT TO AMOUNTS INVESTED IN EACH SUCH ACCOUNT.**

In accordance with federal law, Putnam is required to obtain my name, residential or business address, Social Security or tax identification number, and date of birth (if applicable) in order to verify my identity. In addition, trusts and non-profit organizations are required to provide documentation in order for the funds to verify their identities. Please contact Putnam at 1-800-634-1591 for more information. The information I provide may be shared with third parties for the purpose of verification subject to the terms of Putnam's privacy policy. Putnam is unable to accept this new account if any required information is not provided. If Putnam is unable to verify the account owner's identity, this account will be distributed at the then-current unit value. I understand that federal income taxes may be due on the taxable part of any such distribution. I further understand that under federal tax law any roll over of such distribution to another qualified tuition program that will accept it must occur within 60 days. I will consult my professional tax advisor if I have any questions about the tax consequences of any such distribution.

Signature of account owner

Date (mm/dd/yyyy)

Print name of signature above

### SIGNATURE OF CONTRIBUTOR OR BANK ACCOUNT OWNER

If the checking or savings account indicated in Section 7 is not that of the Putnam account owner, an individual whose name appears on the bank account registration must sign below (only one bank account owner must sign).

Signature of bank account owner (if different from account owner)

Date (mm/dd/yyyy)

Print name of signature above