

Putnam 529 for AmericaSM distribution request form



Return by mail:

Putnam Investments
PO Box 219697
Kansas City, MO 64121-9697

Return by express delivery:

Putnam Investments
430 W 7th Street Suite 219697
Kansas City, MO 64105-1407

For more information:

Putnam Investments
1-877-PUTNAM529
1-877-788-6265
www.putnam.com

Use this form to request a complete, partial, or systematic distribution from your Putnam 529 for America account. Distributions from the account have different tax consequences depending on how the proceeds are used, whether you claim certain federal tax benefits, and certain other factors. State tax treatment of withdrawals used for elementary or secondary school tuition may vary by state, may not align with federal tax withholding, and may be uncertain. You may wish to consult your tax advisor prior to requesting a distribution. Please see the current Offering Statement for details.

Section 1 Account owner and beneficiary information

<i>Name of owner (Individual/organization/trust)</i>	<i>Social Security/tax ID number (required)</i>	<i>Date of birth (mm/dd/yyyy)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact phone number

Note: Providing a phone number above will replace the current contact information on file with Putnam (if applicable). If this field is left blank, no changes will be made.

Name of beneficiary

<i>First</i>	<i>MI</i>	<i>Last</i>	<i>Suffix</i>	<i>Social Security number (required)</i>	<i>Date of birth (mm/dd/yyyy)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 2 Type of distribution

I request the following (**check one**):

- Qualified distribution (**funds will be used for the qualified education of the current beneficiary**). The account owner/beneficiary is responsible for documenting the use of funds for tax purposes.
- Non-qualified distribution (**funds will not be used for the qualified education of the current beneficiary**). Note: The earnings portion of a non-qualified withdrawal will be taxed at the recipient's tax rate and a penalty equal to 10% of the earnings distributed will be imposed.
- Rollover to another Section 529 Qualified Tuition Program. Indicate in Section 4 the other qualified tuition plan's name, beneficiary's name, and the account number. If no beneficiary name is provided, Putnam will default to the current beneficiary.
- Distribution on account of a scholarship award. Attach a copy of the scholarship award letter.
- Distribution due to the permanent disability of the beneficiary. Attach a doctor's letter stating that the beneficiary is unable to attend any eligible educational institution because the injury or illness is expected to continue indefinitely.
- Distribution due to the death of the beneficiary. Attach a certified copy of the beneficiary's death certificate with their name and Social Security number.

Section 3 One-time distribution options

Please select from the options below:

- Distribute 100% of the assets in all Putnam 529 for America accounts for the owner/beneficiary combination named in Section 1

Or

- Take a one-time distribution from the following account(s):

<i>Fund number</i>		<i>Account number</i>	<i>Dollar amount</i>		<i>Percentage</i>
<input type="text"/>	—	<input type="text"/>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="text"/>	—	<input type="text"/>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="text"/>	—	<input type="text"/>	\$ <input type="text"/>	or	<input type="text"/> %
<input type="text"/>	—	<input type="text"/>	\$ <input type="text"/>	or	<input type="text"/> %

Section 4 Distribution payment instructions

Select your payment instructions below; if no selection/instructions are provided, payment will be made to the account owner as registered to the address of record. **See Section 6 for signature guarantee/medallion guarantee stamp requirements.**

- IRS form 1099-Q will be sent to the beneficiary for distribution proceeds payable to (1) the beneficiary or (2) an eligible educational institution.
- IRS form 1099-Q will be sent to the account owner for distribution proceeds payable to (1) the account owner, (2) a new Section 529 Qualified Tuition Program, or (3) an alternate payee.

Electronically deposit (a signature guarantee/medallion guarantee and one of the applicable bank documents are required)

- Into the bank account indicated on the attached document. A preprinted or web-generated voided check/deposit slip or a signed letter from the bank on bank letterhead must be attached. Each of these documents must include: bank name, name(s) as registered on the bank account, routing number and account number. Brokerage checks and investment company checks cannot be used for bank instructions as these checks do not contain the correct wiring information. Contact your investment company to obtain proper wire instructions on signed letterhead. Starter checks will not be accepted. **Please do not staple.**

For electronic deposits to an educational institution, attach a document on the institution's letterhead. The document must include: name of the educational institution, routing number, account number, student name and student ID.

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

Note: One-time distributions will be sent via Federal bank wire; systematic distributions will be sent via Automated Clearing House (ACH). Putnam does not assess a fee for electronic transactions; however some financial institutions may assess a fee upon receipt. Please check with your financial institution for information regarding eligibility, fees, and applicable routing number(s) for Federal bank wire and/or ACH transactions

tape your document here

Name Address City, State, ZIP	DATE _____
PAY TO THE ORDER OF _____ \$ _____ _____ DOLLARS	VOID
memo: _____	
: 123456789 : 000123456789 : 101	

ABA routing number of financial institution

Bank account number

Name(s) of all bank account owner(s)/name of educational institution

For further credit (if applicable)

Send check

Step 1: Select a delivery method

- Mail check(s) via **U.S. Postal Service** (standard delivery)
- Mail check(s) via **overnight/express delivery** (not available for systematic redemptions)

Indicate the \$20 overnight/express fee source, otherwise Putnam will default to taking the fee from the lowest fund-account involved in the transaction. The fee will be taken from the balance of the account.

Fund number

Account number

Step 2: Provide payee/address instructions

- To the account owner as registered to the address of record.
- To the alternate payee/alternate address listed below:

Name of institution/529 qualified tuition program/alternate payee

Student ID/account number (if applicable)

Name of beneficiary (if applicable)

Alternate mailing address (street, city, state, ZIP code)

Section 5 Systematic distribution options

Systematic distributions from your Putnam 529 for America account are only allowed for qualified education expenses. Please indicate a date and frequency for systematic distributions. **If no date is selected, Putnam will default to the 15th.** If the systematic distribution date falls on a weekend or a holiday, the distribution will be made the next business day. If the distribution date falls on a date that does not occur within a particular month (29th-31st), the distribution will be made the prior day, unless this day falls on a weekend or holiday then the distribution will be made the next business day.

Note: Systematic distributions to an eligible educational institution must be sent by check.

Step 1: Distribution allocation(s)

Fund number	Account number	Dollar amount	Annualized Percentage
<input type="text"/>	— <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	— <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	— <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %
<input type="text"/>	— <input type="text"/>	\$ <input type="text"/>	or <input type="text"/> %

Step 2: Distribution frequency

Choose a frequency below. Putnam will default to once per year if no option is selected:

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

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

Begin my systematic distribution(s) on the following date(s):

Distribution date: Additional distribution date: (Use if you wish to distribute multiple times within a month)
(MM/DD) (DD)

Section 6 Authorization

Putnam requires the signature guarantee/medallion guarantee for any of the scenarios listed below. A signature guarantee/medallion guarantee is a stamped assurance by a financial institution that indicates a signature is valid and has the financial backing of the institution.

- distribution is sent electronically to a bank account
- check is not payable to the registered owner (signature guarantee/medallion guarantee not required if the check is made payable to an eligible educational institution)
- request is signed by anyone other than the registered account owner (**must be signed in capacity and accompanied by the appropriate certified legal document(s) with original certification**)
- distribution amount is more than \$100,000
- distribution is payable as registered and mailed to an alternate address for an amount greater than \$25,000
- distribution is payable as registered and mailed to an address that has changed in the past 15 days for an amount greater than \$25,000

I request the distribution indicated above. Putnam Investments, the State of Nevada, the Nevada College Savings Trust Fund and the Board of Trustees of the College Savings Plans of Nevada are entitled to rely on this request and are released from any and all claims I may have or hereafter claim to have with respect to the distribution. I certify that both my Social Security number and that of the beneficiary, set forth in Section 1 is true, correct and complete and that the numbers are our Taxpayer Identification Numbers (TIN).

I authorize the bank/credit union to accept credit entries initiated by Putnam Investor Services, Inc. to the account designated in Section 4, and to credit the same account, without responsibility for correctness thereof or for the existence of any further authorization relating thereto. I agree to indemnify and hold harmless my bank/credit union, the 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 also agree to waive any right under the NACHA rules to rescind any instruction for ACH transactions which have already occurred at the time of the attempt to rescind. This waiver of the rescission right applies to ACH liquidations from the Putnam funds. This authorization may be terminated by me at any time by written notification to Putnam Investor Services, Inc. with reasonable time given to implement my request.

Signature of account owner or authorized party

Print name of signature above

Date (mm/dd/yyyy)

PLACE SIGNATURE/MEDALLION GUARANTEE STAMP BELOW

THE GUARANTEE SHOULD
NOT BE DATED