Coverdell Education Savings Account asset transfer authorization

Putnam INVESTMENTS

Return by mail:
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
1-800-662-0019
www.putnam.com

Use this form to initiate a direct transfer of your current Coverdell Education Savings Account (ESA) to a Putnam Coverdell ESA. If you are establishing a new Putnam Coverdell ESA, you must also attach a completed Coverdell ESA Adoption Agreement.

Section 1 Complete your account information

Name of account director

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

Name of beneficiary

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

Contact phone

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.

Section 2 Select your funds

Please use the Putnam Fund Guide (https://www.putnam.com/literature/pdf/FM103.pdf) to select your investment. Please indicate the account(s) to establish by entering the fund name and number for the corresponding share class. For additional fund elections, please attach a separate sheet of paper with fund number, fund name, dollar amount or percentage.

- For new investments made to Putnam: If no class of shares is indicated, class A shares will be purchased and any unallocated assets will be invested into Money Market A.

Fund number	*Account number/Fund name*	*Dollar amount*		*Percentage*
		$	or	%
		$	or	%
		$	or	%
		$	or	%
		$	or	%
		$	or	%
				100%

Section 3 **Instructions for asset transfer**

I have adopted the Putnam Coverdell ESA plan for which Putnam Fiduciary Trust Company (PFTC) serves as Trustee. If you are establishing a new Coverdell ESA plan at Putnam, you must attach the Coverdell Education Savings Account adoption agreement. Please send all related correspondence and any appropriate remittances to Putnam Investor Services, Inc., P.O. Box 8383, Boston, MA 02266-8383.

Note: *PFTC cannot accept an asset transfer or direct rollover of stock or other marketable securities held in your current plan. Please consult your financial advisor to make other arrangements for these assets.*

Section 3A - To complete a transfer from your Coverdell ESA with another provider

☐ Liquidate assets and transfer the proceeds by check (make check payable to Putnam Fiduciary Trust Company)

☐ Transfer assets "in kind" (if permitted by the plan and acceptable to PFTC). Selecting this option directs Putnam to transfer **all** assets from plan types designated for personal or company plans below.

Section 3B - Present trustee/custodian account information

This authorization instructs my current Trustee/Custodian to liquidate assets from the plan and transfer proceeds by check payable to PFTC (if permitted by the plan and acceptable to PFTC):

☐ Please solicit for 100% of the assets of the account director listed in Section 1

*Account number (**required**)*

or

☐ Solicit for a portion of the assets from the following account(s):

*Account number (**required**)*	*Percentage*		*Dollar amount*
	%	or	$
	%	or	$
	%	or	$

Section 3C - Present trustee/custodian information

Name of present trustee/custodian

Phone

Mailing address

City

State

ZIP code

Name of contact person (if any)

Phone

Section 4 **Account director authorization**

Please consult with your present trustee or custodian if they require a signature guarantee/medallion guarantee stamp and if there are any forms or fees associated with transferring your funds. A signatureguarantee/medallion guarantee is a stamped assurance by a financial institution that indicates a signature is valid and has the financial backing of the institution. The guaranteed stamp should not be dated. If a signature/medallion guarantee is dated, it is only valid for that date.

My signature below also indicates that if I am designating an investment in a fund that I do not already own I have read the fund prospectus(es) and agree to the terms therein.

Signature of Account Director (required)

Print name of signature above

Date (mm/dd/yyyy)

PLACE SIGNATURE/MEDALLION GUARANTEE STAMP

The guarantee should not be dated