

Roth IRA conversion authorization for existing Putnam IRAs C



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Use this form to convert from a Putnam Traditional IRA, SIMPLE IRA, SEP IRA or SARSEP to a Putnam Roth IRA. A conversion from an IRA to a Roth IRA will trigger a taxable event that will be reported to the Internal Revenue Service. If you are establishing a new Putnam Roth IRA, you must also attach a completed Putnam Traditional or Roth IRA adoption agreement. **If you already maintain a contributory Putnam Roth IRA, you do not need to complete a new Traditional or Roth IRA adoption agreement; however, Roth IRA conversion accounts will be established.**

Section 1 Complete your IRA account owner information

Name of account owner

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

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.

Section 2 Convert from

Convert **100%** of the assets in each of my retirement plan type(s) which I have indicated below (please see your statement for plan type):

- IRA Rollover IRA SIMPLE IRA SEP IRA SARSEP IRA

Convert the indicated dollar amount, share amount, or percentage allocation listed below.

Fund number	Account number	Dollar amount	Share amount	Percentage
		\$	or	or %
		\$	or	or %
		\$	or	or %
		\$	or	or %

Please stop the existing systematic investment on the account(s) listed above.

Section 3 Convert to

Indicate the fund(s) into which the amount(s) listed in Section 2 should be transferred upon conversion by selecting from the options below. If no option is selected Putnam will default to transferring the assets in kind. Please note that a **Roth IRA Adoption Agreement is required** if a Roth IRA or Roth Conversion registration does not already exist.

- Please convert the indicated amount(s) from the IRA into the same fund(s) of the Roth Conversion (transfer in kind).
- Please convert the indicated amount(s) from the IRA into the Roth Conversion based on the allocations below. If you are establishing a new fund please indicate the fund name and number which can be found in the Putnam Fund Guide (<https://www.putnam.com/literature/pdf/FM103.pdf>). The share class of the Roth Conversion must remain consistent with the share class of the IRA.

Fund name	Fund number	Account number	Amount	Percentage
			\$	or %
			\$	or %
			\$	or %
			\$	or %

Section 4 Federal income tax withholding

By submitting this form I am electing that no amount converted from my existing Putnam IRA to a Putnam Roth IRA be withheld for federal income tax, except as provided below:

Please withhold _____ % of the distribution(s) from my Putnam IRA account(s) for federal income tax.

I understand that I am still liable for any federal income taxes due on the taxable part of my conversion distribution, and I could incur penalties if my withholding or estimated tax payments for the year are not enough.

Section 5 Authorization

This authorization instructs Putnam Fiduciary Trust Company to convert the indicated amounts of my Putnam IRA to a Putnam Roth IRA, which I have adopted. I acknowledge that this transaction will trigger a taxable event that will be reported to the Internal Revenue Service. I also acknowledge that any contingent deferred sales charge (CDSC) associated with any shares transferred will be transferred pro rata to the new Putnam Roth IRA. I understand that converting from a Putnam IRA to a Putnam Roth IRA will create an account called a Roth IRA Conversion, even if a Roth IRA account already exists for the fund chosen.

My signature below 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 Owner

Date (mm/dd/yyyy)

Print name of signature above