

# Standardized 401(k), profit sharing, or money purchase plan application



**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  
1-800-662-0019  
www.putnam.com



Use this form to establish a new Simplified Profit Sharing Plan, Money Purchase Pension Plan or Standardized 401(k) Plan. **Please note:** Your employer must already have a Simplified Profit Sharing Plan, Money Purchase Pension Plan or Standardized 401(k) Plan established.

## Section 1 Plan type

Select the account type you want to establish. Please complete a separate Standardized 401(k), profit sharing, or money purchase pension plan application to establish additional plan types.

401(k) plan     Profit sharing plan     Money purchase plan

## Section 2 Provide employee information

Name of employee							
First	MI	Last	Suffix	Social security number (required)		Date of birth (mm/dd/yyyy; required)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	
Contact phone number		E-mail address					
<input type="text"/>		<input type="text"/>					

**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, 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			
<input type="text"/>			
City	State	ZIP code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

### Residential address (Required if different than mailing address. No P.O. Box or c/o addresses)

Street			
<input type="text"/>			
City	State	ZIP code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

## Section 3 Provide employer information

Name of company		Company number	
<input type="text"/>		<input type="text"/>	
Street address			
<input type="text"/>			
City	State	ZIP code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

## Section 4 Provide information about your financial advisor

Dealer number

Branch office number

Financial advisor number

CRD number

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

Financial advisor's firm

Financial advisor's contact phone number

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Branch office street address

City

State

ZIP code

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**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 Select your funds

Please use the Putnam Fund Guide (<https://www.putnam.com/literature/pdf/FM103.pdf>) to select your investment. You must enter the fund name and number for the corresponding share class you wish to establish. For additional fund elections, please attach a separate sheet of paper with fund number, fund name and 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.
- Investments made through payroll deduction contributions will be applied for the year received.

Fund number

Fund name

Percentage (percent assigned should be in whole numbers)

			%
			%
			%
			%

**100%** (percentage allocations for all funds must total 100%)

## Section 6 Authorization

I certify under the penalties of perjury that the Employee Social Security number in Section 2 is true, correct and complete. I have received a current prospectus(es) of the Putnam fund(s) selected. For Profit Sharing Plans and Money Purchase Plans, I agree that an annual maintenance fee of \$20.00 will be deducted from the account(s). For 401(k) Plans, I agree that an annual maintenance fee of \$35.00 will be deducted from the account(s).

**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/>**

Signature of employee

Date (mm/dd/yyyy)

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Print name of signature above