



## 1 COMPANY INFORMATION

\_\_\_\_ (“Employer”) requests the ability to deliver Plan Contribution Instructions (defined below), which accompany monetary contributions relating to the retirement plan identified below, to Fiduciary Trust International of the South (“FTIOS”), the custodian of the identified retirement plan, via the Internet or other electronic means.

Total number of employees currently eligible to participate in retirement plan: \_\_\_\_\_

Company name (please print)

Group number (if available)

## 2 TYPE OF RETIREMENT PLAN MAINTAINED BY THE EMPLOYER

- ☐ FTIOS SIMPLE IRA      ☐ FTIOS 403(b) Plan  
☐ FTIOS SEP IRA      ☐ FTIOS Texas Optional Retirement Plan (ORP)

## 3 ELECTRONIC FUNDS TRANSFER AUTHORIZATION

If you would like to facilitate the delivery of Plan contributions by authorizing FTIOS, or its service provider FTIS, to initiate debits against your company's designated bank account in accordance with your Plan Contribution Instructions, please provide the requested information below. Please note that your bank must be a member of the Automated Clearing House (ACH). Allow up to 15 business days for FTIOS to set up your bank account instructions.

**By completing this section, your company will be able to authorize plan contributions directly through eContributions and will not need to provide separate payment via check or Federal wire.**

Group number (if available)

### Select One of the following options:

- ☐ Use my enclosed preprinted voided check.  
☐ Use my enclosed preprinted checking deposit slip.  
☐ Use my enclosed preprinted savings deposit slip.

By signing below, Employer authorizes FTIOS, or its service provider FTIS, to initiate electronic debits to the deposit account identified above (“Bank Account”) when instructed to do so by Employer on eContributions (and to make, if necessary, adjusting transfers if any amounts are transferred in error). FTIOS, or its service provider FTIS, will debit Bank Account within three days of receipt of each set of completed Plan Contribution Instructions through eContributions for the amount designated in the “Target” field on eContributions.

Employer understands and agrees that this authorization will remain in full force and effect until FTIOS has received notification from Employer's authorized officer that the authorization is terminated and FTIOS and the Employer's bank noted above (“Bank”) have had a reasonable opportunity to act on the notification. Employer also agrees that FTIOS, or its service provider, may make additional attempts to debit the Bank Account noted above if an initial attempt fails, and if a transfer is denied by the Bank for any reason, FTIOS will discontinue this authorization.

X \_\_\_\_\_ Date \_\_\_\_\_  
Authorized signer of Bank Account

Name (please print)  
\_\_\_\_\_

Title  
\_\_\_\_\_

X \_\_\_\_\_ Date \_\_\_\_\_  
Authorized signer of Bank Account

Name (please print)  
\_\_\_\_\_

Title  
\_\_\_\_\_

**IN CONSIDERATION OF FTIOS' agreement to accept Plan Contribution Instructions by electronic means without original or underlying documentation, Employer agrees as follows:**

- The term "Plan Contribution Instructions" shall mean instructions from Employer to FTIOS to invest specified monetary amounts in pre-established accounts of participants of the above-identified plan with such instructions being transmitted by Employer either 1) by the completion of a pre-populated online form on the password protected website ("eContributions"), or 2) by electronic transmission of payroll files from exports of existing software packages.
  - Employer shall designate individuals as authorized users of eContributions who will then have the ability to access the website to submit Plan Contribution Instructions, update employer address and other contact information (such as phone number and email address) for the retirement plan and to print a contribution summary to accompany the contribution check. Employers submitting monetary contributions by ACH (Automated Clearing House) or Fed Wire will also be able to use eContributions to transmit the Plan Contribution Instructions. Employer shall submit a separate application (*eContributions New User Request Form*) for each individual to whom it wishes to grant access to eContributions. Login ID and password will be established for each of these individuals and will be sent to Employer's address of record via the United States Postal Service upon receipt of this Application and submission of at least one completed *eContributions New User Request Form*. It is the sole responsibility of Employer to control the security and confidentiality of the login ID(s) and password(s), and Employer acknowledges and agrees that FTIOS may rely upon any Plan Contribution Instructions being transmitted under a login ID and password issued to Employer.
  - The undersigned Employer directs FTIOS to use electronic transmissions of Plan Contribution Instructions, remitted by individuals designated by Employer to use eContributions, to invest monetary contributions to accounts of participants in the above identified retirement plan.
- Employer is solely responsible for transmitting accurate Plan Contribution Instructions to FTIOS, and for bearing the cost of adjusting a participant's account should any errors occur as a result of Employer's Plan Contribution Instructions. If Employer is transmitting Plan Contribution Instructions for a 403(b) salary deferral only plan, Employer further represents that it has entered into salary deferral agreements with its employees for whom it is transmitting Plan Contribution Instructions.
- Employer shall indemnify and hold harmless FTIOS and its service provider, Franklin Templeton Investor Services, LLC ("FTIS"), and their officers, employees, agents and successors (each an "Indemnitee" and collectively the "Indemnitees") from and against any and all liability, loss, suits, claims, costs, damages and expenses of whatever amount and whatever nature, including without limitation, reasonable attorneys' fees, whether for consultation and advice, or representation in arbitration or litigation (an "Indemnifiable Loss") any Indemnitee may sustain or incur by reason of, in consequence of, or arising from, or in connection with, or in relation to an Indemnitee acting or forbearing from taking action in good-faith reliance on Plan Contribution Instructions from Employer or its designee made pursuant to this Application, including, but not limited to, sums paid or liability incurred in settlement of, and expenses paid or incurred in connection with such claims, or judgments as may arise out of the allegations that the Employer's Plan Contribution Instruction on which an Indemnitee acted or forbore from taking action was not in accordance with the participant's specified retirement account investment instructions and/or was not transmitted by an authorized agent of Employer, excepting, however, an Indemnifiable Loss to the extent such loss can be attributed to the gross negligence or willful misconduct of FTIOS.
  - Employer acknowledges and agrees that FTIOS may for any reason, at any time, upon notice to Employer discontinue accepting Plan Contribution Instructions by electronic means.

**EMPLOYER SIGNATURE ONLY**

X \_\_\_\_\_ Date \_\_\_\_\_  
 Authorized Officer signature

\_\_\_\_\_  
 Name (please print) Title

**IMPORTANT: If an original signature guarantee or notary is required you may NOT email or fax your documents.**

EMAIL	FAX	MAIL
<ul style="list-style-type: none"> <li>• Emails <b>MUST</b> include an attachment (PDF preferred) of your request and related case number(s) to be accepted.</li> <li>• Digital communication channels are not necessarily secure. If you do choose to send confidential or sensitive information to us via digital communication channels (e.g. email, chat, text messaging, fax), you are accepting the associated risks related to potential lack of security, such as the possibility that your confidential or sensitive information may be intercepted/accessed by a third party and subsequently used or sold.</li> <li>• If you have not been registered on franklintempleton.com for at least 15 calendar days, call (800) 527-2020 to request a case number to reference in your email.</li> </ul> <p><b>Email To:</b> ftrequests@franklintempleton.com</p>	(855) 891-8377	<p>You may use any of the below mailing addresses:</p> <p><b>Regular Mail</b></p> <ul style="list-style-type: none"> <li>• Franklin Templeton P.O. Box 997153 Sacramento, CA 95899-7153</li> <li>• Franklin Templeton P.O. Box 33033 St. Petersburg, FL 33733-8033</li> </ul> <p><b>Overnight</b></p> <ul style="list-style-type: none"> <li>• Franklin Templeton 3344 Quality Drive Rancho Cordova, CA 95670-7313</li> <li>• Franklin Templeton 100 Fountain Parkway N. St. Petersburg, FL 33716-1205</li> </ul>