



DO NOT use this form for Capital Bank and Trust Company retirement accounts.

Important information:

- To gift shares to a new owner, an UGMA/UTMA account, or a trust account that does not utilize your SSN for tax reporting purposes, use the Gift of Shares Request form.
To gift shares to a charitable organization, use the Gift of Shares to a Charitable Organization form.
If withdrawing from the account at the time of transfer, you must also submit a Request to Sell Shares, available at www.capitalgroup.com.
If you are holding stock certificates for shares involved in this request, return them by registered or certified mail, along with this form. Without them, we will not be able to honor your request. DO NOT sign the certificates.
Any tax questions resulting from this request should be directed to your tax advisor.

1 Current account registration

Enter the information exactly as it appears on your existing American Funds account statement.

Account registration Account number
Address City State ZIP
Email address* Daytime phone

Check here to update the mailing address on your account(s).

*Your privacy is important to us. For information on our privacy policies, visit www.capitalgroup.com.

2 Reason for request

To ensure accurate cost basis reporting, complete A or B. Complete C if applicable.

A. Registration change or transfer other than death. Indicate the reason below.

- Adding or removing a joint owner for a reason other than death or divorce
Relationship of joint owner: Spouse Non-spouse
Divorce/separation
UGMA/UTMA minor has reached the age of majority
Changing trustee of trust for reason other than death of a grantor
Transferring shares to a trust account utilizing your SSN for tax reporting purposes
Other

OR

B. Death of owner, joint owner, or grantor of a trust.

- 1. Date of death (required) (mm/dd/yyyy)
2. Alternate valuation date or amount (optional): Date (mm/dd/yyyy) OR \$

Note: If providing an alternate valuation amount, an individual amount must be provided for each fund when transferring multiple funds. Provide dollar amounts in Section 4.

Continued on next page

2 Reason for request (continued)

C. Details of transfer due to death — required for joint accounts and trust accounts with more than one grantor. Select one.

1. **Account held solely by spouses at time of death.** We will treat the account as equally owned and step-up 50% of the assets, unless you check the box below.
- Check here if you live in a community property state and are eligible to step-up cost basis 100%. Provide the state below.

_____ State

2. **Account NOT held solely by spouses at time of death or Tenants in Common account.** (To properly adjust the cost basis, indicate the percentage of ownership of each owner below. If no percentage is indicated, the shares will be transferred as 100% noncovered and cost basis will not be available.)
- The co-owners' percentage of ownership is equal.
- The co-owners' percentage of ownership for each is different. (Complete the information below.)

_____ %
Name of deceased owner Percentage invested

_____ %
Name of surviving co-owner* Percentage invested

*If there are additional surviving co-owners, attach a separate page with the appropriate information.

3 Account registration Provide recipient information and select A or B.

_____ () _____
Account registration/name of recipient(s) Daytime phone

A. Establish new account and/or change the current registration type.

The new account owners will need to complete and attach one of the applications listed below. Shares will be reinvested in the same manner as removed. Leave the investment instructions section of the application blank or write "in kind."

- For individual, joint, UGMA/UTMA or conservatorship/guardianship accounts, submit the [Application for Individual or Joint Accounts](#).
- For entity accounts, including trust, estate, business and nonprofit accounts, submit the [Application for Entities](#).

Note: In most cases, if tax reporting will remain the same, and the request is not due to death or divorce, we will retain the existing account number. Provide a new application to certify the tax ID number, verify the current investor profile(s), and include current broker-dealer information. If a new application is not received, the broker-dealer information will not be retained.

OR

B. Transfer shares to another existing American Funds account.*

_____ Account number

*If shares are transferred to an existing account, the shares will be subject to the cost basis method currently on the account. To change the cost basis method, obtain and complete a *Cost Basis Update Request*, or access the account at www.capitalgroup.com prior to submitting this request.



4 Instructions

Any assets not transferred will remain in the current owner's account. Select A or B.

Additional documentation may be required for a transfer of shares held in corporate, partnership or fiduciary accounts. Contact us at (800) 421-4225 for requirements.

- A. **Total transfer** — Proceed to Section 5.
- B. **Partial transfer** — You must indicate the dollar amount, number of shares or percentage to be transferred below. For fund names and numbers, review your statement or access your account at www.capitalgroup.com.

Note: If Specific Lot Identification is your cost basis method, you must provide the exact number of shares and corresponding purchase date(s) on a separate page.

To avoid delays, ensure that the requested transaction will not reduce each fund balance below the established fund minimums that must be met and maintained. **The fund minimums are \$1,000 each for money market and state-specific tax-exempt bond funds or \$250 each for all other funds.**

Fund name or number	Amount	Number of shares	Percentage
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
_____	\$ _____	OR _____	OR _____%
	Total \$ _____	OR _____	

Exchanges between funds can be requested after the transfer is complete.



5 Signature(s) of current owner(s) — required

IMPORTANT: If you are the current owner/co-owner, trustee, custodian, beneficiary or the person authorized to act on behalf of the deceased owner, your signature is required below. Generally, all current owners must have their signatures guaranteed. To determine if an exception applies for your request, call us at (800) 421-4225.

I/We authorize the transfer of shares as indicated in Section 4.

If this document is signed electronically, I consent to be legally bound by this document and subsequent terms governing it. The electronic copy of this document should be considered equivalent to a printed form in that it is the true, complete, valid, authentic and enforceable record of the document, admissible in judicial or administrative proceedings. I agree not to contest the admissibility or enforceability of the electronically stored copy of this document.

X _____ Date / /
Signature of current owner, trustee, custodian, beneficiary or person authorized to act on behalf of the deceased owner

X _____ Date / /
Signature of current co-owner (if applicable)

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

If required, signatures must be guaranteed by a bank, savings association, credit union, member firm of a domestic stock exchange or the Financial Industry Regulatory Authority that is an eligible guarantor institution. **A notary public is NOT an acceptable guarantor.** The guarantee must be in the form of a stamp or a typewritten or handwritten guarantee that is accompanied by a raised corporate seal.

Note: A medallion guarantee is acceptable in place of a signature guarantee.

Stamp signature or medallion guarantee here. Stamp signature or medallion guarantee here.

If a signature guarantee is required, this form must be mailed.

DID YOU?

1. Attach a completed application signed by the new owners, if establishing a new account or changing the current registration type?
2. Sign in Section 5 and obtain a signature guarantee, if required?

If mailing, choose the service center for your state. Mail the form to the Indiana Service Center if you live outside the U.S.



American Funds Service Company
P.O. Box 6007
Indianapolis, IN 46206-6007

Overnight mail address
12711 N. Meridian St.
Carmel, IN 46032-9181



American Funds Service Company
P.O. Box 2280
Norfolk, VA 23501-2280

Overnight mail address
5300 Robin Hood Rd.
Norfolk, VA 23513-2430

Investor upload www.capitalgroup.com/submit | Financial professional upload www.capitalgroup.com/upload | Fax (888) 421-4351

For more information, contact your financial professional, visit www.capitalgroup.com or call us at (800) 421-4225.