




Change Ownership

✓ Use this form to:

- Change ownership of an account due to a life event such as financial or estate planning, marriage, divorce, death, or minor reaching age of majority.*
- Gift mutual fund shares to another person or entity.
- Add an agent or attorney-in-fact to an existing account when not using the T. Rowe Price [Power of Attorney \(POA\)](#) form.

-  This stamp indicates a signature guarantee is required.
-  This paper clip indicates you may need to attach documentation.
-  This hand indicates where to sign.

***NOTE:** Review the "Change Ownership Due to Life Events" [mutual fund](#) or [brokerage](#) brochure to determine if additional documentation is needed.

X Do not use this form to:

- Move assets to a different institution.
- Donate to a nonprofit organization. Use the [Gifts to Nonprofit Organizations](#) form.
- Gift Brokerage securities. Use the [Brokerage Gift](#) form.
- Change an owner's legal name. Use the [Name Change](#) form.
- Change an account to a transfer on death registration. Use the [Transfer on Death](#) form.

Mail to:
T. Rowe Price
P.O. Box 17302
Baltimore, MD 21297-1300

Express delivery only:
T. Rowe Price, Mail Code 17302
4515 Painters Mill Road
Owings Mills, MD 21117-4903

1 Current Ownership

Owner, Trustee, or Minor	Social Security Number (SSN)
Joint Owner, Co-trustee, or Custodian	SSN

For more owners, check this box and attach a [separate page](#).

2 Ownership Change

Check a box to indicate how ownership is changing. If the account had checkwriting services, discard the old checks.

Remove the following owner/trustee/custodian/agent:

Name	SSN
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- Add owner(s)/trustee(s)/custodian(s)/agent.
- Change to a different owner(s).

3 Mutual Fund Accounts

A Originating Account

Check one:

- Change ownership of account number(s) provided and all accounts with the same ownership.
- Change ownership of **only** the account number(s) provided.

Fund Name	Account Number	Amount
		<input type="checkbox"/> All <input type="checkbox"/> \$* <input type="checkbox"/> % <input type="checkbox"/> shares
		<input type="checkbox"/> All <input type="checkbox"/> \$* <input type="checkbox"/> % <input type="checkbox"/> shares
		<input type="checkbox"/> All <input type="checkbox"/> \$* <input type="checkbox"/> % <input type="checkbox"/> shares

For more funds, check this box and attach a [separate page](#).

***NOTE:** Dollar balances fluctuate daily with the market. If the dollar amount is close to the total balance, provide share amount instead.

Cost Basis for Originating Account

For purposes of tracking cost basis, the amount transferred will use the cost basis method on the account. Visit [troweprice.com/taxplanning](#) for information on cost basis and consult a tax advisor. Changing ownership of shares is not a sale and is not reported on form 1099-B. The receiving account owner must make a cost basis selection on the [New Account](#) form.

For a different cost basis method, check this box and attach a [separate page](#).

Inherited Assets

If assets are from an estate or a decedent account, consult a tax advisor to determine the adjusted cost basis. Date of death:

Mutual Fund	Adjusted Cost Basis
	\$
	\$
	\$

For more funds, check this box and attach a [separate page](#).

B Receiving Account

Check new account or existing account. If the new owners do not have an account with all the new owner names, check new account. Changing to a trust or estate or switching the primary owner requires a new account.

- New account.** Complete a [Mutual Fund New Account](#) form or visit [troweprice.com/newaccount](#) and provide the account number below.
- Existing account.** Provide account number below. If the new owner(s) has a T. Rowe Price account in another fund, we will open the funds from Section 3A with the same ownership as the account below.

Account Number	Fund Name
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For more funds, check this box and attach a [separate page](#).

4 Brokerage Account

A Originating Account

Complete this section for Brokerage accounts.

From Account Number

Check One:

- Entire account, including the linked money market fund
- Percentage of account, including the linked money market fund %
- Specific securities

Security Name	Symbol	Share Amount
		<input type="checkbox"/> All shares
		<input type="checkbox"/> All shares
		<input type="checkbox"/> All shares

For more securities, check this box and attach a [separate page](#).

Cost Basis

For purposes of tracking cost basis, the amount transferred will use the cost basis method on the account (if none, first in first out for equity securities and average cost for mutual funds). Visit troweprice.com/taxplanning for more information on cost basis and consult a tax advisor. Changing ownership of shares is not a sale and is not reported on form 1099-B. The receiving account owner must make a cost basis selection on the [New Account](#) form.

For a different cost basis method, check this box and attach a [separate page](#).

Inherited Assets

If assets are from an estate or a decedent account, consult a tax advisor to determine the adjusted cost basis. Date of death:

Security Name/Symbol	Adjusted Cost Basis
	\$
	\$
	\$

For more securities, check this box and attach a [separate page](#).

B Receiving Account

Check new account or existing account.

New account. Complete a [Brokerage New Account](#) form or visit troweprice.com/newaccount and provide the account number below.

Existing account. Account Number:

5 Signature(s)

Signature(s) required below to authorize ownership change.

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number; and
2. I am not subject to backup withholding because:
 - a. I am exempt from backup withholding; or
 - b. I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest and dividends; or
 - c. The IRS has notified me that I am no longer subject to backup withholding.
 Cross out item 2 if you have been notified by the IRS that you are currently subject to backup withholding.
3. I am a U.S. citizen or other U.S. person (as defined in the IRS Form W-9 instructions).

If I fail to give the correct number or fail to sign this form, T. Rowe Price may reject, restrict, or redeem my account. I may also be subject to backup withholding, and I may be subject to an IRS penalty.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

NOTE: Sign in front of a signature guarantor if a signature guarantee is required. Review the "Change Ownership Due to Life Events" brochure.

A Owners

Sign Below

Signature(s) and Date(s) Required

Owner, Trustee, or Minor	Date (mm/dd/yyyy)
<input checked="" type="checkbox"/>	
Joint Owner, Co-trustee, or Custodian	Date (mm/dd/yyyy)
<input checked="" type="checkbox"/>	

NOTE: For more signatures, copy this page, sign and enclose.

B Signature Guarantee

If a signature guarantee is required, you must sign this form in the presence of a guarantor who is a participant in the Medallion signature guarantee program. You can obtain the Medallion signature guarantee from most banks, savings institutions or broker-dealers. We cannot accept guarantees from other guarantors or from notaries public or organizations, which do not provide reimbursement in the case of fraud as would a Medallion signature guarantor. When obtaining a Medallion signature guarantee, please discuss with the guarantor the dollar amount of your proposed transaction. It is important that the level of coverage provided by the guarantor's stamp covers the dollar amount of the transaction or it may be rejected.

Medallion Signature Guarantee

Place Medallion Stamp Below:	Name of Institution
	Print Name of Person Providing Guarantee
	Date (mm/dd/yyyy)