Fidelity Investments
Life Insurance Company®

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Trust Statement and Agreement Form

Instructions

• Use this form to establish or change a Trust as the Owner and Beneficiary of an annuity contract or a Fidelity Personal Retirement Annuity[SM] contract. To avoid possible adverse tax consequences, we require that when a Trust is designated as the owner of an annuity contract, the Trust also be the designated Beneficiary. By signing this form, you consent to the Beneficiary change. This statement voids all previous Trustee Statements filed with the Company.[1] If you have questions when filling out this form, please call the Annuity Service Center at 800-634-9361, Monday through Friday, 8am to 8pm Eastern Time. Faxes are not accepted.*

NOTE: Not all annuity contracts owned by a Trust will qualify for a tax deferral unless the Trust holds the contract as "an agent for a natural person" (Internal Revenue Code 72(u)(1)). We will not issue an annuity contract , or change the ownership to a Trust unless all trustees agree to the terms below by providing their signatures.

• To ensure completeness, please use the "Print" button located at the end of the form.

*Required fields

Trust and Trustee Information		
***Trust Name:**		
***Trust's Tax ID Number:**		
***Date of Trust Agreement:**		
***Trustee's First Name:**	***Trustee's Last Name:**	
***Trustee's DOB:**	***Trustees's Social Security Number:**	
***Address Line 1:**		
Address Line 2:		
***City:**	***State:**	***Zip:** -
***Best Telephone Contact:** ◉ Domestic ○ Foreign	***Phone Number:**	

Add New Trustee

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Type of Trust

If this is an existing annuity contract, enter the contract number here:	**Contract Number:**

If this annuity contract is a Fidelity Personal Retirement Annuity[SM], check here: ☐

I hereby certify that this annuity application or existing annuity contract number will be held under one of the following circumstances:

- ◉ **A Revocable Living (Grantor) Trust, with the Grantor as the Lifetime Beneficiary of the Trust, and the Grantor registered as the Annuitant.**
- ○ **An Irrevocable Trust established for the benefit of a minor, i.e., a trust qualified under Section 2503(c) of the Internal Revenue Code. The minor is the Annuitant.**
- ○ **An Irrevocable Trust holding the contract as an agent for the benefit of the Annuitant, whose date of birth is**

Acknowledgement

I/We do hereby represent that the Trust will hold the annuity contract "as an agent for a natural person" in accordance with provisions of 72(u)(1) of the Internal Revenue Code of 1986, as amended. The Trust will be both the owner and the beneficiary of the annuity contract.

Trustee(s) Signatures

The undersigned trustee(s) certifies that it/he/she is a trustee of the named Trust in the Contract Owner Information section of this form and that it/he/she is authorized to exercise ownership rights under the contract in accordance with the terms of the Trust. The trustee(s) agree(s) that all transactions made in reliance upon the statement above shall be the sole responsibility of the trustee. The Company does not assume responsibility for any taxes which may arise from the ownership of this annuity including the 10% early withdrawal penalty tax.

Name of Trustee:

X Signature:	**X Signature Date:**

NAME AND TITLE OF OFFICER,
IF TRUSTEE IS AN INSTITUTION:

Please be sure that all required signatures, as noted by "X," are added to this form prior to submission.

Print   Reset

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Trust Statement and Agreement Form

Please mail this form to:

Fidelity Investments
Life Insurance Company
P.O.Box 770001
Cincinnati, OH 45277-0050

Or in New York:

Empire Fidelity Investments
Life Insurance Company
P.O.Box 770001
Cincinnati, OH 45277-0051

Or Overnight:

Fidelity Investments
100 Crosby Parkway
Mail Zone: KC2Q
Covington, KY 41015

Fidelity Investments Life Insurance Company®

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459522

Fidelity Brokerage Services, LLC.
Member NYSE, SIPC

* In New York Personal Retirement Annuity

[1]"The Company" refers to Fidelity Investments Life Insurance Company, or in NY, Empire Fidelity Investments Life Insurance Company.