

Fidelity Funds Account Transfer of Assets Form

Use this form to authorize the transfer of assets currently at another firm to your Fidelity Funds account. **COMPLETE ONE FORM FOR EACH ACCOUNT YOU ARE TRANSFERRING AND INCLUDE A STATEMENT COPY FROM YOUR CURRENT FIRM.** Note the following:

- The registration of the account being transferred must match your Fidelity Fund account. If the registrations do not match, include the appropriate Fidelity Funds account application with this request.
- Do not use this form to transfer your Fidelity Funds IRA to a Fidelity IRA (brokerage including Fidelity SIMPLE IRAs) or brokerage account; to transfer stocks or bonds "in kind;" to directly roll over a distribution from an employer-sponsored retirement plan into a Fidelity IRA; or convert an IRA to a Roth IRA. Visit us at **Fidelity.com** for the appropriate forms or call us at **800-544-6666**.
- One Transfer Form must be completed for each participant. If you are transferring both a Profit Sharing Plan and a Money Purchase Plan, you will need to complete separate copies of this form for each participant.
- Most transfers take 3-5 weeks to complete. Check the status of your transfer online by logging on to your account at **Fidelity.com**.

Mail your completed transfer form and most recent statement copy to: **Fidelity Investments, P.O. Box 770001, Cincinnati, OH 45277-0036.**

Recent tax law changes have generally increased your rollover options. However, we encourage you to consult your tax advisor before consolidating your retirement savings assets. Certain special tax treatments such as forward averaging and pre-1974 capital gain may not be available if you commingle IRA assets.

1 INFORMATION ABOUT YOUR ACCOUNT

Fidelity Funds account number (if available)	Primary Social Security or Tax Identification Number <div style="border: 1px solid black; width: 100%; height: 20px; display: flex; justify-content: space-between;"> </div>
Account Owner (or Business/Trust)	Name of Firm currently holding your account
Joint Owner (if any)	Account Number at Firm
Daytime Phone Number	Firm's Phone Number

2 YOUR TRANSFER TO FIDELITY (Check one, then proceed to Section 3. Continue on a separate sheet if needed.)

- A. Sell all assets in the account named in Section 1 and send the proceeds to Fidelity.
- B. Sell only the assets listed below from the account named in Section 1 and send the proceeds to Fidelity.

Mutual Fund or Security Name	Dollar Amount or "All"

- C. CD with a Bank, Savings & Loan, or Other Financial Institution
- Liquidate CD immediately. I acknowledge that I may incur a penalty for early liquidation.
- Liquidate CD at maturity. Maturity date is / / . Submit your request 3 weeks prior to maturity.

D. Reregister the Fidelity mutual funds listed below.

Mutual Fund Name	Dollar Amount or All Shares

2 YOUR TRANSFER TO FIDELITY continued

For plan level transfers to Fidelity Retirement Plan (Keogh Profit Sharing or Money Purchase Plan – excluding Self-Employed 401(k) accounts):

This account is for the Employer Employee

This account contains Contributions made by the employer Employee Contributions made with after-tax dollars

3 HOW YOUR TRANSFER WILL BE INVESTED (Check one of the following.)

I have attached my completed Fidelity Funds application.

My existing Fidelity Funds account number is: _____

List the name(s) of the Fidelity mutual funds into which the transfer proceeds are to be deposited. The total must add up to 100%.

Fidelity Fund Name	Percentage of Proceeds
_____	_____ %
_____	_____ %
_____	_____ %

Total = 100%

If you do not indicate a Fidelity mutual fund, your transfer proceeds will be invested in Fidelity Cash Reserves, a money market fund.

4 OWNER AUTHORIZATION

By signing below, I (we) acknowledge reading and agree to the terms and conditions printed on this document.

OWNER SIGNATURE	Date	JOINT OWNER/CUSTODIAN/TRUSTEE SIGNATURE (IF ANY)	Date
X			

Signature Guarantee:

Verify with the firm from which you are transferring to see if a signature guarantee or other documentation is required.

Owner Authorization & Agreement to Terms

Please transfer the assets as indicated in Section 2 to Fidelity.

I have received and read the prospectus for the fund(s) in which I am making my investment.

For retirement account transfers:

- If I am over 70½, I attest that none of the amount to be transferred will include the required minimum distribution for the current year pursuant to Section 401(a)(9) of the Internal Revenue Code.
- I acknowledge that I have adopted a Fidelity IRA, Fidelity Roth IRA, or Fidelity Retirement Plan (Keogh) excluding Self-Employed 401(k) accounts with Fidelity Management Trust Company as successor custodian/trustee, and I agree to transfer only those assets which can be held in such accounts, as described in the relevant Custodial Agreement or Plan Document.
- I acknowledge that I have adopted a Fidelity IRA or a Fidelity Roth IRA with Fidelity Management Trust Company as a successor custodian.
- If transferring assets from your qualified retirement plan(s) to the Fidelity Retirement Plan excluding Self-Employed 401(k) accounts, contact your tax advisor to determine if it is necessary to file Form 5310-A prior to the transfer.

If you have requested that mutual fund shares be redeemed, they will be redeemed at the net asset value next determined after your transfer request is reviewed and determined to be in good order by the delivering firm. If your transfer request is processed electronically, your mutual fund shares will be redeemed at the net asset value determined after all conditions are satisfied in accordance with the procedures established pursuant to the applicable electronic system.

Fidelity Will Complete This Section. Letter of Acceptance for Transfer to a Fidelity Mutual Fund Retirement Account.

To Transferor Custodian: Fidelity Management Trust Company accepts appointment as successor custodian/trustee for the retirement account referred to in Section 1 of this form.

Authorized Fidelity Signature: _____

