

Change of Account Ownership—Information

Changing to a Trust, Estate, Guardian, or Conservator Account

Helpful to Know

- Requirements for a registration change vary widely depending on the types of accounts. Look for your specific situation in this matrix to determine what paperwork you will also need to submit with this form.
- Please note: ALL required forms and supporting documentation must be provided at the time this form is submitted, or we will be unable to reregister the account as requested.
- If the reregistration is due to the current owner's death, a change to a Usufruct registration, or the death of a minor, call Transition Services at 800-544-0003 for assistance.
- Go to [Fidelity.com/forms](https://www.fidelity.com/forms) to download any additional forms that may be required.

Requirements for Different Types of Account Change

From an Individual Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
Trust—Owner Deceased	<ul style="list-style-type: none"> • Probated estate: Legal representative signs in Section 9a. • All Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> • Legal representative of estate if the account is over \$100,000. 	<ul style="list-style-type: none"> • Copy of death certificate. • Certified copy of court appointment naming legal representative of the estate dated within 180 days, or a small estate affidavit or an alternate court document, if eligible under state law. • Copy of state tax waiver, if required by your state. • Domestic Trusts: <i>Fidelity Certification of Trust</i> form. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership for Trusts section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—Current Owner Living	<ul style="list-style-type: none"> • Current owner signs in Section 9a. • All Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> • Current owner, but only if the account is over \$10,000 and someone other than the current owner will be the trustee. • Current owner if the account is over \$100,000 and adding a co-trustee. 	<ul style="list-style-type: none"> • Domestic Trusts: <i>Fidelity Certification of Trust</i> form. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership for Trusts section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Estate	<ul style="list-style-type: none"> • All legal representatives sign in Section 9b. 	<ul style="list-style-type: none"> • None. 	<ul style="list-style-type: none"> • Copy of death certificate. • Certified copy of court appointment naming legal representative of the estate dated within 180 days. • Copy of state tax waiver, if required by your state. • The <i>Co-Fiduciary Certification</i> form if adding two or more executors. • If the legal representative is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.

Change of Account Ownership—Information continues on next page. ►►

From an Individual Account (continued)

Guardianship or Conservatorship	<ul style="list-style-type: none"> Guardian or Conservator MUST sign in Section 9b. 	<ul style="list-style-type: none"> None. 	<ul style="list-style-type: none"> Certified copy of court appointment naming Guardian or Conservator dated within 180 days. If the Guardian or Conservator is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
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From a Joint Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
Trust—Current Owners Are Trustees	<ul style="list-style-type: none"> Current owners MUST sign in Section 9b. 	<ul style="list-style-type: none"> None. 	<ul style="list-style-type: none"> Domestic Trusts: <i>Fidelity Certification of Trust</i> form. Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. Complete the Beneficial Ownership for Trusts section. If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—One Current Owner Is Trustee	<ul style="list-style-type: none"> Current owners sign in Section 9a. All Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> Relinquishing owners, if account is over \$100,000. 	<ul style="list-style-type: none"> Domestic Trusts: <i>Fidelity Certification of Trust</i> form. Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. Complete the Beneficial Ownership for Trusts section. If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—Current Owners Are Trustees and Adding One or More Trustees	<ul style="list-style-type: none"> Current owners sign in Section 9a. All Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> Current owners, if account is over \$100,000. 	<ul style="list-style-type: none"> Domestic Trusts: <i>Fidelity Certification of Trust</i> form. Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. Complete the Beneficial Ownership for Trusts section. If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Estate—One Owner Deceased <i>Tenants in Common or Community Property</i>	<ul style="list-style-type: none"> All legal representatives sign in Section 9b. 	<ul style="list-style-type: none"> None. 	<ul style="list-style-type: none"> Copy of death certificate. Copy of state tax waiver, if required by your state. Certified copy of court appointment naming legal representative of the estate dated within 180 days. The <i>Co-Fiduciary Certification</i> form if adding two or more executors. Letters of Instruction from surviving owner and legal representative. If the legal representative is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.

Change of Account Ownership—Information continues on next page. ►►

From a Joint Account (continued)

Estate—All Owners Deceased <i>Joint WROS or Tenants by Entirety</i>	<ul style="list-style-type: none"> • All legal representatives sign in Section 9b. • None. 	<ul style="list-style-type: none"> • Copy of death certificate for all owners. • Copy of state tax waiver, if required by your state. • Certified copy of court appointment naming legal representative of the estate dated within 180 days. • The <i>Co-Fiduciary Certification</i> form from each legal representative if there are two or more appointed. • If the legal representative is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
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From a Trust Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
Trust—Adding a Trustee	<ul style="list-style-type: none"> • A current Trustee signs in Section 9a. • All Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> • Current Trustees, only if account is over \$100,000. 	<ul style="list-style-type: none"> • Domestic Trusts: <i>Fidelity Certification of Trust</i> form • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—Removing a Trustee	<ul style="list-style-type: none"> • A current Trustee signs in Section 9a. • All remaining Trustees sign in Section 9b. 	<ul style="list-style-type: none"> • Resigning Trustees, only if account is over \$100,000. 	<ul style="list-style-type: none"> • Domestic Trusts: <i>Fidelity Certification of Trust</i> form • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—One Trustee Deceased	<ul style="list-style-type: none"> • Successor Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> • Successor Trustees if account is over \$100,000. 	<ul style="list-style-type: none"> • Copy of death certificate. • Copy of state tax waiver, if required by your state. • Domestic Trusts: <i>Fidelity Certification of Trust</i> form or copy of trust documents. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership for Trusts section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.
Trust—All Trustees Deceased	<ul style="list-style-type: none"> • Successor Trustees MUST sign in Section 9b. 	<ul style="list-style-type: none"> • Successor Trustees if account is over \$100,000. 	<ul style="list-style-type: none"> • Copy of death certificate. • Copy of state tax waiver, if required by your state. • Domestic Trusts: <i>Fidelity Certification of Trust</i> form or copy of trust documents. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures. • Complete the Beneficial Ownership for Trusts section. • If any Trustee/Beneficial Owner is an Entity: Additional documentation is required. Refer to the <i>Requirements for an Entity Reregistering an Account</i> section on page 4.

Change of Account Ownership—Information continues on next page. ►►

Requirements for an Entity Reregistering an Account

Change to a Trust Account

Relationship	Required Documents
New or Remaining Trustee Is a Trust	<ul style="list-style-type: none"> • <i>Fidelity Trustee Certification—Adding or Removing Trustees</i> form, and any other required documents as listed in that form. • Domestic Trusts: <i>Fidelity Certification of Trust</i> form. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures.
New or Remaining Trustee Is an Entity	<ul style="list-style-type: none"> • Depending on the entity structure, complete the <i>Beneficial Ownership—Control Person/Entity Owner for Entities</i> and the <i>Certification for Fidelity Funds Business Accounts</i> forms, and include any other required documents as listed in the forms.
New or Remaining Beneficial Owner Is a Trust	<ul style="list-style-type: none"> • <i>Fidelity Beneficial Ownership for Trusts</i> form.
New or Remaining Beneficial Owner Is an Entity	<ul style="list-style-type: none"> • <i>Fidelity Beneficial Ownership—Control Person/Entity Owner for Entities</i> form.

Change to an Estate, Guardianship, or Conservator Account

Relationship	Required Documents
New or Remaining Legal Representative, Guardian, or Conservator Is a Trust	<ul style="list-style-type: none"> • <i>Fidelity Trustee Certification—Adding or Removing Trustees</i> form, and any other required documents as listed in that form. • Domestic Trusts: <i>Fidelity Certification of Trust</i> form. • Foreign Trusts: Copy of trust documents, including the full name of the trust, the trust date, the name of the trustee(s), and all signatures.
New or Remaining Legal Representative, Guardian, or Conservator Is an Entity	<ul style="list-style-type: none"> • Depending on the entity structure, complete the <i>Beneficial Ownership—Control Person/Entity Owner for Entities</i> and the <i>Certification for Fidelity Funds Business Accounts</i> forms, and include any other required documents as listed in the forms.

Change of Account Ownership— Mutual Fund Only Accounts

Changing to a Trust, Estate, Guardian, or Conservator Account

Use this form to update a Trust, Estate, Guardian, or Conservator account, or to change an Individual or Joint account into one of those accounts. Do NOT use this form to update account details (such as a change of address). Do NOT use this form for Brokerage accounts (except to change a Brokerage account to a Mutual Fund Only account), Annuities, Cash Management Accounts, or Health Savings Accounts. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

Helpful to Know

Requirements for a registration change vary widely depending on the types of accounts. Review "Change of Account Ownership—Information" at the beginning of this form for important information regarding the requirements for your accounts.

- To change the registration of multiple accounts, submit a separate form for each account.
- In certain circumstances, you will be assigned a new account number.
 - If a new account number is required, you will need to wait until all recent transactions on the account (deposits, checks, bill payments) have cleared before submitting this form, otherwise the transactions may not be processed. You will also need to reestablish any desired account features.
 - If you are not assigned a new account number, you will keep any account features you have (except checkwriting).

- If you want checkwriting on your account, all remaining and new owners must sign the *Checkwriting* form—even if you already have checkwriting on your existing account. Visit [Fidelity.com/checkwriting](https://www.fidelity.com/checkwriting) to download the form.
- To avoid delays, be sure all **CURRENT** and **NEW** owners provide their information in the appropriate section(s) and sign this form (except owners who have proof of guardianship). Also, be sure to include ALL supporting documentation required for your particular type of request, as described in "Change of Account Ownership—Information" at the beginning of this form.
- Registration changes can have tax and/or legal consequences. You may want to review this document with a tax, financial, or legal advisor.

1. Account to Be Changed

Indicate the owner whose SSN is the tax reporting number on the account.

Primary Owner/Trustee Name	Account Number

2. Primary Owner Status

Check one.
The decedent's SSN may not be used for trust and estate accounts.

- ☐ Tax reporting number for the account remains the same.
- ☐ Tax reporting number for the account is changing. A new account number will be assigned if the primary owner (the owner whose tax reporting number is the tax reporting number on the account) will not remain as the primary owner or is removed from the account.

Note: If the new registration type is Guardian or Conservator, a new account number will be assigned, unless the existing account has beneficiaries established.

3. New Registration Type **REQUIRED.**

To change to an Individual, Joint, or Custodial account, complete the *Change of Account Ownership—Changing to an Individual, Joint, or Custodial Account* form. For more about account types, go to [Fidelity.com/chgacct](https://www.fidelity.com/chgacct).

Required.
Check **ONLY** one registration type and provide any required information.

- ☐ Trust
- ☐ Estate
- ☐ Guardian
- ☐ Conservator

Form continues on next page. ►►

4. Trust or Estate Information *Skip to Section 5 for other account registration types.*

If providing an SSN for the trust, it must be that of a living grantor. A decedent's SSN may not be used for tax reporting.

Trust or Estate Name <i>For a trust, enter the full trust name as evidenced by the trust document.</i>		Date of Trust <i>MM DD YYYY</i>
Taxpayer ID Number <i>U.S.-Issued ID Only</i>	Required <input type="checkbox"/> SSN/ITIN <input type="checkbox"/> Entity ID/TIN	For a domestic trust, provide the state. For a foreign trust, provide the country.*

*Your trust documents set forth the terms of your trust. Based on these documents, please tell us which state's laws apply to your trust. If your trust is subject to foreign law, please tell us which country's laws apply.

5. Primary Trustee/Legal Representative/Ward *Required to be completed.*

Provide the following information for the primary trustee, legal representative, or ward ONLY. This section MUST be completed, even if the primary individual is the same. To provide information on additional trustees, legal representatives, conservators, and/or guardians, new and current, you can do so in Section 6 and **have all owners sign in Section 9b**. Do not make copies of this Section 5 for additional owners.

Important to Note: If the trustee or legal representative is an entity, enter the full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation). Additional Fidelity forms are required, and all required forms and supporting documentation must be provided at the time this form is submitted, or we will be unable to reregister the account as requested.

ONLY if the individual listed below is a trustee, check all boxes that apply:

- | | |
|---|---|
| <input type="checkbox"/> Trustee Only | <input type="checkbox"/> Authority to appoint/remove trustees |
| <input type="checkbox"/> Trustee and Grantor | <input type="checkbox"/> Authority to revoke/amend the trust |
| <input type="checkbox"/> Trustee is an Entity | |

Enter full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card).

First Name	Middle Name	Last Name
Entity Name <i>Enter full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation).</i>		
Date of Birth <i>MM DD YYYY</i>	Taxpayer ID Number <i>U.S.-Issued ID Only</i>	<input type="checkbox"/> SSN/ITIN OR <input type="checkbox"/> Entity ID/TIN
Mobile Phone	Email	

Mobile phone number and email are required for account security, transactional alerts, and delivery of other communications.

By signing this form, you agree to conduct business with Fidelity electronically and to the electronic delivery of all account-related documents and communications. You consent to Fidelity's use of your email and/or mobile number to message, call, or text you for this purpose. Message and data rates apply; frequency may vary. For help with texts, reply HELP. To opt out of texts, reply STOP. You may also update your contact information at any time through your profile on Fidelity.com. Please look for an email to confirm your information and the terms of this consent.

Residential Address (where you live) *This is your legal address used for tax reporting.*

Street Address		
City	State	ZIP Code

Mailing Address *This may be a PO Box, drop box, or c/o location.*

- ☐ Same as residential address *Default if no other information indicated below.*

Mailing Address		
City	State	ZIP Code

Primary Trustee/Legal Representative/Ward continues on next page. ►►

Citizenship

Indicate your citizenship status. ☐ U.S. citizen *Do not complete the fields below.*

☐ Foreign citizen *Information in this box must be completed.*

Country of Citizenship

Choose one. ☐ Permanent U.S. resident ☐ Nonpermanent U.S. resident ☐ Nonresident of U.S.

Government Identification Number

ID Number Country of Issuance

ID Issuance Date MM DD YYYY ID Expiration Date MM DD YYYY

☐ Passport Number ☐ Permanent Resident Identifier ☐ Other Government-Issued ID Number

Unexpired ID must include reference number and photo. Attach copy of ID.

6. New and/or Remaining Trustee/Legal Representative/Conservator/Guardian

Provide the following information for each additional trustee/legal representative/conservator/guardian to be added to the account and/or for each additional individual/entity that is remaining on the account. If there are more than two individuals/entities, make a copy of this Section 6 and **have ALL owners sign in Section 9b.**

Important to Note: If providing information for an entity, enter the full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation). Additional Fidelity forms are required, and all required forms and supporting documentation must be provided at the time this form is submitted, or we will be unable to reregister the account as requested.

ONLY if the individual listed below is a trustee, check all boxes that apply:

- ☐ Trustee Only ☐ Authority to appoint/remove trustees
- ☐ Trustee and Grantor ☐ Authority to revoke/amend the trust
- ☐ Trustee is an Entity

Enter full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card).

First Name Middle Name Last Name

Entity Name *Enter full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation).*

Date of Birth MM DD YYYY Taxpayer ID Number *U.S.-Issued ID Only*

☐ SSN/ITIN **OR** ☐ Entity ID/TIN

Mobile phone number and email are required for account security, transactional alerts, and delivery of other communications.

Mobile Phone Email

By signing this form, you agree to conduct business with Fidelity electronically and to the electronic delivery of all account-related documents and communications. You consent to Fidelity's use of your email and/or mobile number to message, call, or text you for this purpose. Message and data rates apply; frequency may vary. For help with texts, reply HELP. To opt out of texts, reply STOP. You may also update your contact information at any time through your profile on *Fidelity.com*. Please look for an email to confirm your information and the terms of this consent.

New and/or Remaining Trustee/Legal Representative/Conservator/Guardian continues on next page. ►►

Residential Address (where you live) This is your legal address used for tax reporting.☐ Same as residential address in Section 5 ▶ Default if no other information indicated below.

Street Address		
City	State	ZIP Code

Mailing Address This may be a PO Box, drop box, or c/o location.☐ Same as residential address ▶ Default if no other information indicated below.

Mailing Address		
City	State	ZIP Code

CitizenshipIndicate your
citizenship status. ▶☐ U.S. citizen Do not complete the fields below.☐ Foreign citizen Information in this box must be completed.

Country of Citizenship

Choose one. ▶

☐ Permanent U.S. resident ☐ Nonpermanent U.S. resident ☐ Nonresident of U.S.**Government Identification Number**

ID Number	Country of Issuance
ID Issuance Date MM DD YYYY	ID Expiration Date MM DD YYYY

Unexpired ID must
include reference
number and photo.
Attach copy of ID.☐ Passport Number ☐ Permanent Resident Identifier ☐ Other Government-Issued ID Number

Form continues on next page. ▶▶

7. Beneficial Ownership for Trusts *Skip to Section 8 if the reregistered account is NOT a trust.*

Complete this section to provide information for all beneficial owners of the trust, including each grantor who is NOT also a trustee and is not already listed in Sections 5 and 6, as well as all other individuals named in the trust who are authorized to appoint/remove trustees, and/or revoke/amend the trust. Any individuals listed in this section will not have any authority to take action on this account unless they are a trustee or have been granted account authority. Make a copy of this Section 7 for additional individuals.

Important to note: If this beneficial owner is a trust or other entity, you must enter the full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation), and provide either a completed *Beneficial Ownership for Trusts* or a *Beneficial Ownership—Control Person/Entity Owners for Entities* form, as applicable, along with this form. All required forms and supporting documentation must be provided at the time this form is submitted, or we will be unable to reregister the account as requested.

Required.
Check ALL that apply.

- ☐ Living Grantor ☐ Authority to appoint/remove trustees
☐ Grantor is deceased. ☐ Authority to revoke/amend the trust
 ▶ Provide ONLY full legal name.

Enter full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card).

First Name	Middle Name	Last Name
Entity Name Enter full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation).		
Date of Birth MM DD YYYY	Taxpayer ID Number U.S.-Issued ID Only	If applicable <input type="checkbox"/> SSN/ITIN <input type="checkbox"/> Entity ID/TIN

Residential Address (where you live) *This is your legal address used for tax reporting.*

- ☐ Same as residential address in Section 5 ▶ Default if no other information indicated below.

Cannot be a PO Box or mail drop.

Street Address		
City	State	ZIP Code

Citizenship

Indicate your citizenship status. ▶

- ☐ U.S. citizen Do not complete the fields below.

- ☐ Foreign citizen Information in this box must be completed.

Country of Citizenship

Choose one. ▶

- ☐ Permanent U.S. resident ☐ Nonpermanent U.S. resident ☐ Nonresident of U.S.

Government Identification Number

ID Number	Country of Issuance
ID Issuance Date MM DD YYYY	ID Expiration Date MM DD YYYY

Unexpired ID must include reference number and photo. Attach copy of ID.

- ☐ Passport Number ☐ Permanent Resident Identifier ☐ Other Government-Issued ID Number

Beneficial Ownership for Trusts continues on next page. ▶▶

Additional Beneficial Owner

Required.
Check ALL that apply.

- ☐ Living Grantor
 ☐ Authority to appoint/remove trustees
☐ Grantor is deceased.
 ☐ Authority to revoke/amend the trust
 ▶ Provide ONLY full legal name.

Enter full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport, permanent resident card).

First Name	Middle Name	Last Name
Entity Name Enter full entity name as evidenced by the relevant formation document (e.g., trust document, partnership agreement, articles of incorporation).		
Date of Birth MM DD YYYY	Taxpayer ID Number U.S.-Issued ID Only	If applicable <input type="checkbox"/> SSN/ITIN <input type="checkbox"/> Entity ID/TIN

Residential Address (where you live) This is your legal address used for tax reporting.

Cannot be a PO Box or mail drop.

- ☐ Same as residential address in Section 5 ▶ Default if no other information indicated below.

Street Address		
City	State	ZIP Code

Citizenship

Indicate your citizenship status. ▶

- ☐ U.S. citizen Do not complete the fields below.

- ☐ Foreign citizen Information in this box must be completed.

Country of Citizenship

Choose one. ▶

- ☐ Permanent U.S. resident
 ☐ Nonpermanent U.S. resident
 ☐ Nonresident of U.S.

Government Identification Number

Unexpired ID must include reference number and photo. Attach copy of ID.

ID Number	Country of Issuance
ID Issuance Date MM DD YYYY	ID Expiration Date MM DD YYYY
<input type="checkbox"/> Passport Number <input type="checkbox"/> Permanent Resident Identifier <input type="checkbox"/> Other Government-Issued ID Number	

8. Account Features

Additional features may be available for your account. You may establish most of these online at [Fidelity.com/updateaccountfeatures](https://www.fidelity.com/updateaccountfeatures).

Checkwriting

To add checkwriting, go to [Fidelity.com/checkwriting](https://www.fidelity.com/checkwriting) to download the *Checkwriting* form. If maintaining an existing account that has the checkwriting feature and the owners are changing, a new signature card is required. To see if a fund you own is eligible for checkwriting, visit the Fees & Features tab on the fund's research page at [Fidelity.com](https://www.fidelity.com).

Dividend and Capital Gain Distributions

For new accounts, all dividends and capital gain distributions will be reinvested into the fund. If the account number stays the same, the elections will remain the same as the prior registration. To change this election, call Fidelity or go to [Fidelity.com/updateaccountfeatures](https://www.fidelity.com/updateaccountfeatures).

Form continues on next page. ▶▶

9. Signatures and Dates

Please be sure to read all the language included on the following pages, as well as sign, date, and return all pages of this form (1–10) to Fidelity.

In the section below, “Fidelity,” “us,” and “we” refer to the Fidelity mutual funds and their agents (including Fidelity Investments Institutional Operations Company and its subsidiaries and affiliates) as the context may require; “you” and “account owner” refer to the existing and/or new owner indicated on this form, as the context may require; and for any account with more than one owner (such as a joint or trust account), “you” and “account owner” or “account owners” refer to all owners, collectively and individually.

By signing below, you:

Account owner(s), trustee(s), legal representative(s), conservator(s), and/or guardian(s) authorizing this change in registration:

- Request that Fidelity change the current registration of your account to the new registration as indicated on this form, and you understand that in certain circumstances a new account number may be assigned.
- Acknowledge and understand that by changing the registration, you may be changing the ownership interests and/or removing individuals authorized to transact business or access this account.
- Acknowledge that Fidelity will not be liable for any loss, expense, or cost arising out of your instructions, provided that it institutes reasonable procedures to prevent unauthorized transactions.

New/remaining trustee(s), legal representative(s), conservator(s), and/or guardian(s):

- Acknowledge that you have received and read the prospectus for the fund(s) in which you are investing and you agree to the terms of the prospectus(es). You affirm that you have the authority and legal capacity to purchase mutual fund shares, are of legal age, and believe each investment is suitable for you. You understand that it is your responsibility to read the prospectus of any fund into which you exchange.
 - Understand that all the information you have provided in this form, all the terms and conditions to which you have consented, and the certifications contained herein, will apply to any new fund(s) into which your shares may be exchanged.
 - **Understand that your account balance and certain uncashed checks issued from your account may be transferred to a state unclaimed property administrator if no activity occurs in the account or a check remains outstanding within the time period specified by the applicable state law.**
 - **Understand that this fund is not a bank, and fund shares held in a Fidelity Mutual Fund Account are not backed or guaranteed by any bank or insured by the FDIC, SIPC, or any other government agency.**
 - **Affirm that you could lose money by investing in a money market fund. Although the fund seeks to preserve the value of your investment at \$1.00 per share, it cannot guarantee it will do so. An investment in the fund is not a bank account and is not insured or guaranteed by the Federal Deposit**
- Insurance Corporation or any other government agency. Fidelity Investments and its affiliates, the fund's sponsor, is not required to reimburse money market funds for losses, and you should not expect that the sponsor will provide financial support to the fund at any time, including during periods of market stress.** Fidelity's government and U.S. Treasury money market funds will not impose a fee upon the sale of your shares.
- Ratify any instructions, including telephone and Internet instructions, given on this account. You agree that neither the fund, Fidelity Investments Institutional Operations Company, and/or its successors, assignors, or agents, will be liable for any loss, cost, or expense for acting upon any instructions if it follows reasonable procedures designed to prevent unauthorized transactions. You consent to the use of recorded telephone conversations.
 - Agree to provide and maintain as current both your mobile number and email address, as both are required for account security, transactional alerts, and delivery of other communications. You consent to Fidelity's use of your email address and/or mobile number to message, call, or text you for these purposes. Since electronic communications (wired and wireless) may not be encrypted, you acknowledge that there is a risk that data, including email, personal data, and electronic and wireless communications, may be accessed by unauthorized third parties when communicated between you and Fidelity, or between you and other parties.
 - Agree to conduct business with Fidelity and its affiliates electronically, which necessarily includes having your personal financial information transmitted electronically, and to electronic delivery of all documents (including your initial notice of Fidelity's privacy policy) and communications related to this account and all other Fidelity accounts.
 - Understand that any information you provide to Fidelity may be shared with third parties for the purpose of validating your identity and may be shared for other purposes in accordance with Fidelity's Privacy Policy. Any information you give to Fidelity may be subject to verification, and you authorize Fidelity to obtain a credit report about you at any time. Upon written request, you will be provided the name and address of the credit reporting agency used.

- Certify that all information provided in this form is true, accurate, and complete.
- Understand that “you” refers to all account owners, authorized persons, and/or trustees and each of the account owners agrees that any account owner, authorized person, and/or trustee has authority to act on the account without notice to the other account owners, authorized persons, and/or trustees. Fidelity and/or its associates, successors, assignors, or agents, each, in its sole discretion, and for its protection, may require the written consent of all account owners, authorized persons, and/or trustees prior to acting upon the instructions of any account owner or authorized person.
- Agree to indemnify and hold Fidelity harmless from and against any and all losses, liabilities, claims, and costs (including reasonable attorneys' fees) that are in any way connected with your instructions hereunder. You further agree that the indemnifications in this bullet are in addition to, and do not limit, any rights that Fidelity may have under any other agreement with you.
- Certify that this account is not a Pooled or Omnibus Account. A Pooled or Omnibus Account is a single account that pools the holdings of more than one beneficial owner, whose identities are not disclosed to Fidelity, in which the beneficial owners have the ability to effect transactions, and for which sub-accounting is performed by the Omnibus Account holder or a third party.
- Acknowledge that you will receive a monthly account statement from Fidelity, unless there are no transactions in a particular month. In any case, you will receive a statement quarterly.
- Consent to have only one copy of Fidelity mutual fund shareholder documents, such as prospectuses and shareholder reports (“Documents”), delivered to you and any other investors sharing your address. Your Documents, if held in eligible accounts, will be househanded indefinitely; however, you may revoke this consent at any time by contacting Fidelity at 800-343-3548 and you will begin receiving multiple copies within 30 days. As Documents for other investments become available in the future, these Documents may also be househanded in accordance with this authorization or any notice or agreement you received or entered into with Fidelity or its service providers.

Signatures and Dates continues on next page. ►►

- Agree that upon transfer of assets due to any life event (death, divorce, etc.), and unless otherwise instructed, all dividend/ interest income paid to the Transferor (Current Asset Holder) of \$100 or less will be systematically allocated to the Transferee (New Asset Holder) receiving the largest share proportion of the account assets. If the account is transferred evenly, the dividend/ interest income will be systematically allocated to the last transferee paid.

For Trust Accounts only, you certify as Trustee that:

- The trust has not been revoked, modified, or amended in any manner that would cause the statements contained in this trust certification to be incorrect.
- The trust exists under all applicable laws.
- There are no Trustees of the Trust other than those listed above. Every trustee (whether you are the sole trustee or there is more than one) has signed below and is authorized to make these statements. Should only

one person execute this agreement, it shall be a representation that the signer is the sole Trustee.

- You agree to inform Fidelity, in writing, of any change in the composition of the Trustees, or any other event that could alter the certifications made herein.
- You agree that you will promptly notify Fidelity if or when beneficial ownership of the trust changes.
- You have the authority under the trust and applicable law to enter into transactions and issue the instructions that you make on behalf of the Trust account with Fidelity. The Trustees understand that all such transactions and instructions will be governed by the terms and conditions of all other account agreements applicable to this account. The Trustees, jointly and severally, indemnify Fidelity and hold Fidelity harmless from any claim, loss, expense, or other liability for acting pursuant to the instructions given by the Trustees. The Trustees further

agree not to give any instructions for which they are not in full compliance with the Trust.

- Fidelity has the authority to accept instructions relative to the account from those individuals listed as Trustees in Sections 5 and 6. They may execute any documents on behalf of the Trust that Fidelity may require, and each trustee may act independently.
- Fidelity is authorized to follow the instructions of any Trustee and to deliver funds, securities, or any other assets in the account to any Trustee on any Trustee's instructions, including delivering assets to a Trustee personally. Fidelity, in its sole discretion and for its sole protection, may require the written consent of any or all Trustees before acting on the instructions of any Trustee.
- If included, the pages of the Trust document are true copies of the valid legal document currently in effect.
- Where applicable, plural references in this certification shall be deemed singular.

To help the government fight financial crimes, federal regulation requires Fidelity to obtain and verify your name, date of birth, address, and a government-issued ID number before opening your account, and to verify the information. In certain circumstances, Fidelity may obtain and verify comparable information for any person authorized to make transactions in an account. Also, federal regulation requires Fidelity to obtain and verify the beneficial owners and control persons of legal entity customers. Requiring the disclosure of key individuals who own or control a legal entity helps law enforcement investigate and prosecute crimes. Your account may be restricted or closed if Fidelity cannot obtain and verify this information. Fidelity will not be responsible for any losses or damages (including, but not limited to, lost opportunities) that may result if your account is restricted or closed.

If you are a U.S. person for tax purposes, you:

- Certify under penalties of perjury that you are a U.S. person (including a U.S. resident alien or other U.S. person as defined in the instructions to IRS Form W-9) and the Social Security or Taxpayer Identification Number provided is correct (or that you are waiting for a number to be issued to you).

If the IRS has notified you that you are currently subject to backup withholding because you failed to report all interest and dividends on your tax return, CROSS OUT all of the bracketed text at right.

- Certify under penalties of perjury that you are not subject to backup withholding because any of the following applies:
 - You are exempt from backup withholding.
 - You have not been notified by the Internal Revenue Service (IRS) that you are subject to backup withholding as a result of a failure to report all interest or dividends.
 - The IRS has notified you that you are no longer subject to backup withholding.

- Certify under penalties of perjury that the FATCA code(s) entered on this form (if any) indicating that you are exempt from FATCA reporting are correct.

If you are not a U.S. person for tax purposes:

- You are submitting the applicable Form W-8 with this form to certify your foreign status and, if applicable, claim tax treaty benefits.

Signatures and Dates continues on next page. ►►



9a. Refer to the “Change of Account Ownership — Information” at the beginning of this form to determine who needs to sign in this Section 9a.

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

To avoid delays, be sure ALL REQUIRED Individuals sign this form in the appropriate Section 9a or 9b.

A Medallion signature guarantee may be required if the account balance is more than \$10,000; see the matrix at the beginning of this form for requirements.

If the form is completed at a Fidelity Investor Center with all signers present, the Medallion signature guarantee is not required. You can get one from most banks, credit unions, and other financial institutions. **A notary seal/stamp is NOT a signature guarantee.**

PRINT OWNER NAME	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

PRINT OWNER NAME	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

▼ MEDALLION SIGNATURE GUARANTEE ▼

Signatures and Dates continues on next page. ►►



9b. Refer to the “Change of Account Ownership — Information” at the beginning of this form to determine who needs to sign in this Section 9b.

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

To avoid delays, be sure **ALL REQUIRED** Individuals sign this form in the appropriate Section 9a or 9b.

A Medallion signature guarantee is required for the current owner if the account balance is more than \$100,000.

If the form is completed at a Fidelity Investor Center with all signers present, the Medallion signature guarantee is not required. You can get one from most banks, credit unions, and other financial institutions. **A notary seal/stamp is NOT a signature guarantee.**

By signing below, you acknowledge that you have read, understand, and agree to be bound by the provisions of this form, including the terms and conditions above.

PRINT OWNER NAME	
PRINT OWNER TITLE, REQUIRED (E.G., TRUSTEE, GUARDIAN, CONSERVATOR)	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

PRINT OWNER NAME	
PRINT OWNER TITLE, REQUIRED (E.G., TRUSTEE, GUARDIAN, CONSERVATOR)	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

Did you sign the form and any necessary documents? Send the ENTIRE form and any attachments to Fidelity Investments. You will receive a “Revised Account Profile.”

Questions? Go to [Fidelity.com/chgacct](https://www.fidelity.com/chgacct) or call 800-343-3548.

Regular mail
Fidelity Investments
PO Box 770001
Cincinnati, OH 45277-0039

Overnight mail
Fidelity Investments
Account Reregistration Services
100 Crosby Parkway KC1C
Covington, KY 41015

Shareholder services provided by National Financial Services (NFS) and Fidelity Brokerage Services LLC (FBS). On this form, “Fidelity” means FBS and NFS and their respective affiliates. All trademarks indicated are the property of their respective owners. 658263.13.0 (06/24)

Fidelity Certification of Trust

Use this form to certify your trust to Fidelity. This form is for domestic trusts only. Do NOT use this form for foreign trusts. If your account is in the name of a foreign trust, or if you prefer not to complete this form, certify your trust by providing pages of the trust document that include the full name of the trust, trust date, name of the trustee(s), and all signatures. Do not include the entire trust document.

Some states require trustee signatures to be notarized (see page 2 for specific states).

Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

1. Trust Information *ALL fields are required unless indicated otherwise.*

<p>Provide the tax reporting number for the trust.</p> <p>Enter full first and last name as evidenced by a government-issued, unexpired document (e.g., driver's license, passport). If grantor/trustee is an entity, enter full entity name as evidenced by the relevant formation document (e.g., trust document, articles of incorporation).</p> <p>Write "none" on each line if there are no person(s) who can AMEND or REVOKE the trust.</p>	Trust Name <i>Enter full trust name as evidenced by the trust document.</i>		
	Trust Account Number	Date of Trust <i>MM DD YYYY</i>	Trust Taxpayer ID/Social Security Number
	Grantor Name(s)		
	Trustee Name		
	Co-Trustee Name <i>Required if there is more than one trustee. If there are more than two trustees, make copies of this form.</i>		
	Name(s) of the person(s) who can AMEND the trust <i>Field cannot be left blank.</i>		
Name(s) of the person(s) who can REVOKE the trust <i>Field cannot be left blank.</i>			
Provide which state's laws apply to your trust.*			

*Your trust documents set forth the terms of your trust. Based on these documents, please tell us which state's laws apply to your trust.

2. Trustee Certification *ALL trustees must sign and date on the next page.*

In this form, "Fidelity," "us," and "we" refer to Fidelity Brokerage Services LLC, National Financial Services LLC, and their affiliates; and their respective employees, agents, representatives, shareholders, successors, and assigns as the context may require. "You" refers to the undersigned trustee(s).

Each trustee must sign and date this form. Make copies of this page and the next as needed.

By signing on the next page, you certify as trustee that:

- To help the government fight financial crimes, federal regulation requires Fidelity to obtain your name, date of birth, address, and a government-issued ID number before opening your account, and to verify the information. In certain circumstances, Fidelity may obtain and verify comparable information for any person authorized to make transactions in an account. Also, federal regulation requires Fidelity to obtain and verify the beneficial owners and control persons of legal entity customers. Requiring the disclosure of key individuals who own or control a legal entity helps law enforcement investigate and prosecute crimes. Your account may be restricted or closed if Fidelity cannot obtain and verify this information. Fidelity will not be responsible for any losses or damages (including, but not limited to, lost opportunities) that may result if your account is restricted or closed.
- The trust has not been revoked, modified, or amended in any manner that would cause the statements contained in this trust certification to be incorrect.
- The trust exists under all applicable laws.
- There are no trustees of the trust other than those listed above. Every trustee (whether you are the sole trustee or there is more than one) has signed below and is authorized to make these statements. Should only one person execute this agreement, it shall be a representation that the signer is the sole trustee.
- You agree to inform Fidelity, in writing, of any change in the composition of the trustees, or any other event that could alter the certifications made herein.
- You have the authority under the trust and applicable law to enter into transactions and issue the instructions that you make on behalf of the trust account with Fidelity. The trustees understand that all such transactions and instructions will be governed by the terms and conditions of all other account agreements applicable to this account. The trustees further agree not to give any instructions for which they are not in full compliance with the trust.
- Fidelity has the authority to accept instructions relative to the account from those individuals listed as trustees in Section 1. They may execute any documents on behalf of the trust that Fidelity may require, and each trustee may act independently.
- Fidelity is authorized to follow the instructions of any trustee and to deliver funds, securities, or any other assets in the account to any trustee on any trustee's instructions, including delivering assets to a trustee personally. Fidelity, in its sole discretion and for its sole protection, may require the written consent of any or all trustees before acting on the instructions of any trustee.
- All information provided in this form is true, accurate, and complete.
- You agree to indemnify Fidelity (jointly and severally) from and hold Fidelity harmless for any and all losses, liabilities, claims, and costs (including reasonable attorneys' fees) resulting from our effecting any transaction or acting upon any instruction given by you or any authorized agent, advisor, or any third party you authorize on the account, or from your action or inaction, whether intentional or not, including losses resulting from the action or inaction of any authorized agent, advisor, or any other third party you authorize on the account. You further agree that the indemnifications in this bullet are in addition to, and do not limit, any rights that Fidelity may have under any other agreement with you.
- Where applicable, plural references in this certification shall be deemed singular.

Trustee Certification continues on next page. ►►

Your trust documents set forth the terms of your trust. Based on these documents, you can identify which state's laws apply to your trust. All trustee signatures **MUST** be notarized if your trust is governed by the laws of California, Delaware, Idaho, Iowa, Kansas, Michigan, Minnesota, Mississippi, Nebraska, Nevada, South Dakota, Tennessee, or Vermont.

PRINT TRUSTEE NAME	
TRUSTEE SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

PRINT TRUSTEE NAME	
TRUSTEE SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

Important Note: CA Notaries are permitted to submit a separate page notary document. If used, it must identify the document being notarized.

Notice to CA Residents: A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

Certificate of Acknowledgement of Notary Public *Must be a U.S. Notary. Foreign notary or consular seals may NOT be substituted.*

State of _____, in the County of _____, subscribed and sworn to before me by the above-named trustee who is personally known to me or who has produced _____ as identification, that the foregoing statements were true and accurate and made of his/her own free act and deed, on ____/____/____.

PRINT NOTARY NAME	
NOTARY SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

▼ NOTARY SEAL / STAMP ▼

My commission expires ____/____/____.

Certificate of Acknowledgement of Notary Public *Must be a U.S. Notary. Foreign notary or consular seals may NOT be substituted.*

State of _____, in the County of _____, subscribed and sworn to before me by the above-named trustee who is personally known to me or who has produced _____ as identification, that the foregoing statements were true and accurate and made of his/her own free act and deed, on ____/____/____.

PRINT NOTARY NAME	
NOTARY SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

▼ NOTARY SEAL / STAMP ▼

My commission expires ____/____/____.

Did you sign the form and attach any necessary documents? Send the ENTIRE form and any attachments to Fidelity Investments.

Questions? Go to [Fidelity.com](https://www.fidelity.com) or call 800-343-3548.

Regular mail

Fidelity Investments
PO Box 770001
Cincinnati, OH 45277-0039

Overnight mail

Fidelity Investments
Account Reregistration Services
100 Crosby Parkway KC1C
Covington, KY 41015

On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates. Brokerage services are provided by Fidelity Brokerage Services LLC, Member NYSE, SIPC. 532335.10.0 (08/21)