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Fidelity INVESTMENTS

Questions? Call 800-634-9361.

Automatic Rebalancing

Fidelity Personal Retirement Annuity® and Fidelity Retirement Reserves® Annuity

Use this form to establish, change, or cancel an automatic rebalancing program for your annuity contract. 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

- To establish, change, or cancel automatic rebalancing for more than one annuity, use a separate form for each contract.
- If you do not provide an end date in Section 3, the rebalancing schedule will continue until your annuity matures or until you submit an automatic rebalancing form that specifies an end date.

1. Contract Owner(s)

Contract Owner Name

Joint Contract Owner Name *if applicable*

Phone numbers will be used if we have questions, but will not be used to update your account information.

Evening Phone	Daytime Phone	Extension

2. Contract Involved and Request Type

Provide contract number and check ONLY one.

Fidelity Annuity Contract Number

☐ ESTABLISH an automatic rebalancing plan ▷ *Complete all sections of this form.*

☐ CHANGE the existing automatic rebalancing plan ▷ *Complete all sections of this form.*

☐ CANCEL the existing automatic rebalancing plan and DO NOT ADD a new plan ▷ *Skip to Section 5.*

3. Rebalancing Schedule

We may sometimes rebalance your annuity funds later than the date you request. Examples include days that the stock market is closed or when your requested date is a non-business day. Subsequent transfers will occur on the same day of the month as the start date that you select.

Check ONLY one frequency and provide start and end dates.

☐ Annually

☐ Semiannually

☐ Quarterly

Start Date *MM DD YYYY*

End Date *MM DD YYYY Optional.*

▷ *Dates MUST be between the 1st and the 28th of the month.*

Form continues on next page. ▶▶

4. Allocation

We will invest assets according to your selection below.

Check ONLY one and provide any required information.

☐ Use the premium allocation ALREADY ON FILE *May differ from the contract's current portfolio allocation.*

☐ REPLACE the premium allocation already on file and invest in these funds at these percentages:

Percentages MUST be whole numbers.

Annuity Fund Name or Symbol	Percentage
	.0%
	.0%
	.0%
	.0%
	.0%
	.0%

Total must add up to 100%. .0%

5. Signature and Date *ALL contract owners must sign and date.*

By signing below, you:

- Certify that all information you provided is correct to the best of your knowledge.
- Authorize Fidelity to act on all instructions given on this form.
- Understand that the premium allocation you select for automatic rebalancing may differ from the contract's current portfolio allocation.

PRINT OWNER NAME

OWNER SIGNATURE **DATE** *MM DD YYYY*

SIGN X

PRINT JOINT OWNER NAME

JOINT OWNER SIGNATURE **DATE** *MM DD YYYY*

SIGN X

Did you sign the form? Send the ENTIRE form to Fidelity Investments. You will receive a "Revised Annuity Profile."

Questions? Call 800-634-9361.

Regular Mail *Except NY*
Annuity Service Center
P.O. Box 770001
Cincinnati, OH 45277-0050

Regular Mail *NY only*
Annuity Service Center
P.O. Box 770001
Cincinnati, OH 45277-0051

Overnight Mail
Fidelity Investments
100 Crosby Parkway, KC2Q
Covington, KY 41015

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