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Fidelity INVESTMENTS

Questions? Go to Fidelity.com/movemoney or call 800-634-9361.

Electronic Funds Transfer (EFT)–Annuities

Use this form to set up or modify a way to transfer funds between your annuity contract and your bank account, and also to update EFT instructions for an existing Systematic Withdrawal, Income Payments, or Annuity Builder Program. Do NOT use for non-annuity accounts such as Fidelity IRA or Retirement Plans (Keogh). Type on screen or print out and fill in. For best results, use CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Helpful to Know

- To be eligible for EFT, your account must be with an institution that is a member of the Automated Clearing House (ACH) and is a commercial bank, savings and loan, or credit union. Call the institution to determine its membership status.
- A Medallion signature guarantee is required unless you are establishing EFT for a bank account in your name and you attach a voided check or account statement (for checking accounts) or a deposit slip or account statement (for savings accounts).
- The table below provides important details about EFT.

Initial setup time	• 4 business days
When funds are available	• Typically 4–7 business days
Maximum per transaction	• $100,000 (if placed online)
Fees charged by Fidelity	• None
Fees charged by your bank	• Ask your bank

1. Contract Number/Owner(s)

*Your **annuity contract number** can be found on a recent statement or the portfolio positions page on Fidelity.com.*

Annuity Contract Number	Annuity Contract Number	Annuity Contract Number

__Trust and UGMA/UTMA Accounts:__ Provide names of authorized individuals in the Contract Owner fields.

Contract Owner Name

Joint Contract Owner Name *if applicable*

Phone numbers will be used if we have questions.

Evening Phone	Daytime Phone	Extension

2. Existing EFT Information

To delete existing instructions, check the box below or call Fidelity. If you only want to add new instructions, not delete existing instructions, skip to Section 3.

☐ Delete existing EFT instructions for the Contract listed in Section 1.

3. Apply EFT to Contract Payments/Program(s)

☐ Income payments from your annuity

Select ONLY if already established on your contract.

☐ Systematic Withdrawal Program

☐ Annuity Builder Program

Form continues on next page.

4. New EFT Information

Your annuity contract and non-annuity contract must have at least one owner's name in common.

Bank Account

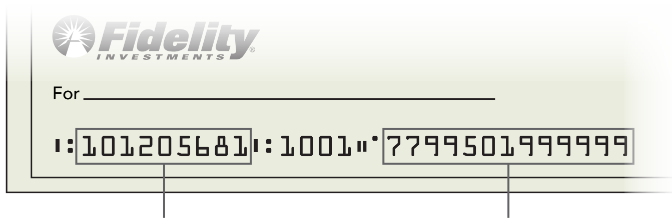
Check ONLY one. ☐ Checking *Attach voided check with your full name preprinted on it or account statement. Do NOT attach deposit slip.* ☐ Savings *Attach deposit slip or account statement and provide bank routing number.*

Owner(s) Name(s) Exactly as on Bank Account	
Bank Routing/ABA Number (Nine digits, starts with 0, 1, 2, 3, or 4)	Bank Name
Checking or Savings Account Number	

Ask your bank for the correct routing number.

If you do not attach a voided check, a savings deposit slip, or a bank statement, you MUST obtain a Medallion signature guarantee in Section 5.

Attach here:



Example of ABA routing number

Example of account number

Fidelity Nonretirement Account

Note that distributions to a brokerage account will be deposited to the core position only.

Fidelity Nonretirement Account Number	Fidelity Fund Name or Symbol *Mutual fund accounts ONLY.*

5. Signature and Date *Form cannot be processed without signature and date of ALL contract owners.*

By signing below, you:

- Authorize Fidelity to act on all instructions given on this form.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is correct.
- Acknowledge that Fidelity may, under certain circumstances, share some of my data with a third-party fraud prevention service for the purpose of verifying that I am an authorized signatory of the Bank Account which I would like to link to the Annuity. Such data may, for the purpose of fraud prevention, include my name, bank account identification information, Social Security number, and date of birth. If Fidelity is unable to validate my account, I will be advised of that fact, and will be provided with a statement of my rights under the Fair Credit Reporting Act.
- Authorize Fidelity, upon receiving instructions from you, to make payments of amounts representing redemptions by you or distributions payable to you by initiating credit or debit entries to the bank account identified in Section 2 or as indicated on the attached account statement, voided check, or deposit slip.
- Authorize and request the bank named above to accept such entries from Fidelity, and to credit or debit, as indicated, your account at the bank in accordance with these entries without responsibility for the appropriateness or for the existence of any further authorization.
- 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.

Signature and Date continues on next page.

Who must sign?

- Owner of Contract
- Joint Owner of Contract (if jointly held)
- All Trustees (if trust owned)
- Custodian (if UGMA)

Do I need a Medallion signature guarantee?

- ONLY if you requested EFT for a bank account and did not attach:
  – ***For a checking account:*** a voided check or account statement with your name preprinted on it
  – ***For a savings account:*** a deposit slip or an account statement with your name preprinted on it

Where can I get a Medallion signature guarantee?

- You can get one at most banks, credit unions, and other financial institutions. A notary seal is not a signature guarantee.
- You can have the form authenticated at a Fidelity Investor Center if all signers are present.

Print Owner Name

SIGN Owner Signature X Date *MM DD YYYY*

MEDALLION SIGNATURE GUARANTEE

Print Joint Owner Name

SIGN Joint Owner Signature X Date *MM DD YYYY*

MEDALLION SIGNATURE GUARANTEE

Individual providing signature guarantee *Providing this information will avoid delay or rejection of your request.*

Guarantor Name	Phone	Extension

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

Questions? Call 800-634-9361.

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

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

Overnight Mail
Fidelity Investments
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Covington, KY 41015

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