Fidelity Investments

Change of Address/Name Change or Provide Date of Birth

Instructions: To update your address, name, and/or provide us with your date of birth, please complete this form.

For address changes: A confirmation of your address change will be sent to your old and new addresses. Please notify us should you not receive the current address confirmation. To ensure the security of your account, **your account will be frozen from loan and withdrawal activity for fifteen calendar days. To waive this fifteen-day freeze, a signature guarantee is required. Please notify us should you not receive the current address confirmation.**

To change your name: Please provide a copy of a legal document such as a marriage certificate, divorce decree, or court authorized name change.

Date of birth: We must have your date of birth on file for you to establish a personal identification number (PIN) or request a withdrawal from your account.

Return this form to: ***Fidelity Investments, P.O. Box 770002, Cincinnati, OH 45277-0090***

If you wish to overnight this form, return it to: ***Fidelity Investments, 100 Crosby Parkway, KC1E, Covington, KY 41015***

If you have any questions, please contact one of our Retirement Services Specialists at 1-800-343-0860 Monday through Friday from 8:00 a.m. to midnight ET.

1. YOUR INFORMATION

Please use a **black** pen and print clearly in **CAPITAL LETTERS.**

Social Security #: ☐☐☐-☐☐-☐☐☐☐ Date of Birth: ☐☐-☐☐-☐☐☐☐

First Name: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Last Name: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Street Address: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Address Line 2: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

City: ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ State: ☐☐

Zip: ☐☐☐☐☐-☐☐☐☐

Daytime Phone: ☐☐☐-☐☐☐-☐☐☐☐ Evening Phone: ☐☐☐-☐☐☐-☐☐☐☐

Please be sure to sign the next page of this form!

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2. YOUR SIGNATURE

Your Signature: X

Date: □□-□□-□□□□

A **Signature guarantee** is required if you are changing your address and would like to waive the fifteen-day freeze.

If the guarantee stamp to the right is not a medallion signature, print the name of the person issuing the guarantee, and their phone number:

□□□-□□□-□□□□

NOTE: A NOTARY PUBLIC CANNOT PROVIDE A SIGNATURE GUARANTEE.

Place signature guarantee stamp in box.

☐ If you are submitting additional documents please check here and list below:

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_____

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Fidelity INVESTMENTS

Fidelity Investments Institutional Operations Company, Inc.

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