

# Change of Account Ownership—Information

## Changing to a Mutual Fund Only Individual, Joint, or Custodial 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 may 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
<b>Joint Account — Adding Spouse</b>	<ul style="list-style-type: none"> <li>• Current owner.</li> <li>• New owner (spouse).</li> </ul>	<ul style="list-style-type: none"> <li>• Current owner, but only if the account is over \$100,000 and you don't provide a copy of the marriage certificate.</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of marriage certificate (to avoid need for signature guarantee).</li> </ul>
<b>Joint Account — Adding Anyone Except a Spouse</b>	<ul style="list-style-type: none"> <li>• Current owner.</li> <li>• New owner(s).</li> </ul>	<ul style="list-style-type: none"> <li>• Current owner, but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
<b>Individual Account — Change of Owner</b> <i>Note: Current owner must be living.</i>	<ul style="list-style-type: none"> <li>• Current owner.</li> <li>• New owner.</li> </ul>	<ul style="list-style-type: none"> <li>• Current owner, but only if the account is over \$10,000.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
<b>UGMA/UTMA Account</b>	<ul style="list-style-type: none"> <li>• Current owner.</li> <li>• New custodian.</li> </ul>	<ul style="list-style-type: none"> <li>• Current owner, but only if the account is over \$10,000 and someone other than the current owner will be the custodian.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
<b>Individual Account — Owner Deceased</b>	<ul style="list-style-type: none"> <li>• Probated estate: Legal representative signs in Section 7a if different from new owner. New Owner signs in Section 7b.</li> <li>• Non-probated estate: New owner signs in Section 7b.</li> </ul>	<ul style="list-style-type: none"> <li>• Legal representative of the estate if the account is over \$100,000.</li> </ul> <p><i>Note: Signature guarantee is not required if the new account owner is the legal representative or if transferring to the heirs according to the small estate affidavit.</i></p>	<ul style="list-style-type: none"> <li>• Copy of death certificate.</li> <li>• Certified copy of court appointment naming executor of the estate dated within 180 days or a small estate affidavit or alternate court document if eligible under state law.</li> <li>• Copy of state tax waiver, if required by your state.</li> </ul>

### From a Joint Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
<b>Joint Account — Replacing a Deceased Owner</b> <i>JWROS or Tenants by Entirety</i>	<ul style="list-style-type: none"> <li>• Surviving current owner(s).</li> <li>• New owners.</li> </ul>	<ul style="list-style-type: none"> <li>• Surviving current owner(s), but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of death certificate.</li> <li>• Copy of state tax waiver, if required by your state.</li> </ul>

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## From a Joint Account, continued

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
<b>Joint Account — Replacing a Deceased Owner</b> <i>Tenants in Common or Community Property</i>	<ul style="list-style-type: none"> <li>Surviving current owner(s).</li> <li>Probated estate: Legal representative signs in Section 7a if different from new owner. New Owner signs in Section 7b.</li> <li>Non-probated estate: New owner signs in Section 7b.</li> </ul>	<ul style="list-style-type: none"> <li>Surviving current owner if account is over \$100,000 and adding another owner.</li> <li>Legal representative of estate if over \$100,000 and transferring to another owner.</li> </ul>	<ul style="list-style-type: none"> <li>Copy of death certificate.</li> <li>Copy of state tax waiver, if required by your state.</li> <li>Letter of Instruction confirming ownership share if needed for clarification.</li> <li>Certified copy of court appointment naming executor of the estate dated within 180 days or a small estate affidavit or alternate court document if eligible under state law.</li> </ul>
<b>Joint Account — Adding a New Owner</b>	<ul style="list-style-type: none"> <li>Current owners.</li> <li>New owners.</li> </ul>	<ul style="list-style-type: none"> <li>Current owners, but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Individual Account — Removing an Owner</b> <i>Note: All current owners must be living.</i>	<ul style="list-style-type: none"> <li>Current owners.</li> <li>New owner.</li> </ul>	<ul style="list-style-type: none"> <li>Current owners, but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Individual Account — One Owner Deceased</b> <i>JWROS or Tenants By Entirety</i>	<ul style="list-style-type: none"> <li>Surviving current owner(s).</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Copy of death certificate.</li> <li>Copy of state tax waiver, if required by your state.</li> </ul>
<b>Individual Account — One Owner Deceased</b> <i>Tenants in Common or Community Property</i>	<ul style="list-style-type: none"> <li>Surviving current owner(s).</li> <li>Probated estate: Legal representative signs in Section 7a if different from new owner. New owner signs in Section 7b.</li> <li>Non-probated estate: New owner signs in Section 7b.</li> </ul>	<ul style="list-style-type: none"> <li>Legal representative of estate if over \$100,000 and transferring to another owner.</li> </ul>	<ul style="list-style-type: none"> <li>Copy of death certificate.</li> <li>Copy of state tax waiver, if required by your state.</li> <li>Letter of Instruction confirming ownership share, if needed for clarification.</li> <li>Certified copy of court appointment naming executor of the estate, dated within 180 days, or a small estate affidavit or alternate court document, if eligible under state law.</li> </ul>
<b>UGMA/UTMA Account</b> <i>Note: The person becoming the custodian must be a current owner.</i>	<ul style="list-style-type: none"> <li>Current owners.</li> <li>New custodian.</li> </ul>	<ul style="list-style-type: none"> <li>Current owners, but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>

## From a Trust Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
<b>Individual or Joint Account—All Trustees Living</b>	<ul style="list-style-type: none"> <li>Current Trustees.</li> <li>New owners.</li> </ul>	<ul style="list-style-type: none"> <li>Current Trustees only if account is over \$10,000 and transferring to another owner or if account is over \$100,000 and adding a new owner.</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
<b>Individual or Joint Account—Some or All Trustees Deceased</b>	<ul style="list-style-type: none"> <li>Current Trustees or the Successor Trustee if the Trustee is deceased.</li> <li>New owners.</li> </ul>	<ul style="list-style-type: none"> <li>Successor Trustee if account is over \$100,000.</li> <li>Current Trustees only if account is over \$100,000 and transferring to another owner or if adding a new owner.</li> </ul>	<ul style="list-style-type: none"> <li>Copy of death certificate(s) of deceased trustee(s).</li> <li>Copy of state tax waiver, if required by your state.</li> <li>Fidelity Trustee Certification—Adding or Removing Trustees form, and any other required documents as listed in that form.</li> </ul>

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## From an UGMA/UTMA (Custodial) Account

Change To	Who Must Sign	Who Must Get a Medallion Signature Guarantee	Required Documents
<b>Individual Account for Minor Who Is Now of Age</b>	<ul style="list-style-type: none"> <li>• Custodian.</li> <li>• New owner (former minor).</li> </ul>	<ul style="list-style-type: none"> <li>• Custodian, but only if the account is over \$100,000.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
<b>UGMA/UTMA Account with Different Custodian</b> <i>Note: The same state and age of termination as existing UTMA/UGMA account must be kept.</i>	<ul style="list-style-type: none"> <li>• Successor custodian. Must sign as new owner, also.</li> <li>• Resigning custodian.</li> </ul>	<ul style="list-style-type: none"> <li>• Resigning custodian, but only if the account is over \$10,000.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
<b>UGMA/UTMA Account — Custodian Deceased</b> <i>Minor under 14</i> <i>Note: The same state and age of termination as existing UTMA/UGMA account must be kept.</i>	<ul style="list-style-type: none"> <li>• Successor custodian.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of custodian's death certificate.</li> <li>• Copy of state tax waiver, if required by your state.</li> </ul> <p>And one of these:</p> <ul style="list-style-type: none"> <li>• Copy of the minor's birth certificate naming the parents, one of which will be the custodian.</li> <li>• Copy of the court appointment of the new custodian/conservator or guardian of the minor's assets, if the new custodian is not the parent of the minor, certified within 180 days.</li> <li>• Letter of Instruction from a parent appointing the new custodian with signature guarantee if the account is more than \$100,000.</li> </ul>
<b>UGMA/UTMA Account — Custodian Deceased</b> <i>Minor between 14–20</i> <i>Note: The same state and age of termination as existing UTMA/UGMA account must be kept.</i>	<ul style="list-style-type: none"> <li>• Successor custodian.</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of custodian's death certificate.</li> <li>• Copy of state tax waiver, if required by your state.</li> </ul> <p>And, if within 60 days of death:</p> <ul style="list-style-type: none"> <li>• Letter of Instruction from the minor appointing new custodian if death occurred within last 60 days.</li> </ul> <p>Or if after 60 days:</p> <ul style="list-style-type: none"> <li>• Copy of the minor's birth certificate naming the parents, one of which will be the custodian.</li> <li>• Copy of court appointment of the new custodian/conservator or guardian of the minor's assets, if new custodian is not the parent of the minor, certified within 180 days.</li> <li>• Letter of Instruction from a parent appointing the new custodian with signature guarantee if the account is more than \$100,000.</li> </ul>
<b>UGMA/UTMA Account — Custodian Deceased</b> <i>Former minor 21 and over</i>	<ul style="list-style-type: none"> <li>• New owner (former minor).</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of custodian's death certificate.</li> <li>• Copy of state tax waiver, if required by your state.</li> </ul>

# Change of Account Ownership— Mutual Fund Only Accounts

## Changing to an Individual, Joint, or Custodial Account

Use this form to add or delete an owner on a Mutual Fund Only Individual, Joint, or Custodial (UGMA/UTMA) account or to change any type of account (except a business, retirement, or 529 Savings Plan 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 re-establish any desired account features.

– In most other cases, you will be able to keep your current account number and 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/Minor Name	Account Number

## 2. Primary Owner Status

Check one.

- ☐ Keep the current primary owner as the primary owner  
Tax reporting number for the account remains the same. Exception: UTMAs/UGMAs require a new account number even if the tax reporting number remains the same.
- ☐ Change the primary owner to a different primary owner  
Tax reporting number for the account is changing. Account number will change.

## 3. New Registration Type Required

For more about account types, go to [Fidelity.com/chgacct](https://www.fidelity.com/chgacct).

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

For new joint accounts, if you do not check a registration type, or if you are ineligible for the registration type selected, you will be defaulted to "Joint: tenants with rights of survivorship."

- ☐ Individual
- ☐ UGMA/UTMA (custodial):
- State

Default if no state indicated: minor's state of residence.
- ☐ Joint: Tenants with rights of survivorship Not available in Louisiana.
- ☐ Joint: Tenants in common\*
- ☐ Joint: Community property
- ☐ Joint: Tenants by the entirety
- ☐ Joint: Usufruct Available ONLY in Louisiana.

\*For tenants that are trusts, include a Fidelity Trustee Certification—Adding/Removing Trustees form, and either a Certification of Trust form, or the applicable pages from the trust document, for each trust along with this form. Go to [Fidelity.com/forms](https://www.fidelity.com/forms) to download the forms.

Form continues on next page. ►►

#### 4. Primary Account Owner (Minor for custodial accounts) *Required*

Provide the following information for the primary owner ONLY, or for the minor on a custodial account. This section MUST be completed, even if the primary owner/minor is the same. To provide information on additional owner(s), new and current, you can do so in Section 5 and have all owners sign in Section 7b. Do not make copies of this Section 4 for additional owners.

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).		
Taxpayer ID Number U.S.-Issued ID Only	Required	Date of Birth MM DD YYYY
	<input type="checkbox"/> SSN/ITIN <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

#### 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

Form continues on next page. ►►

## 5. New and/or Remaining Additional Owner(s) or Updated Custodian Due to Death or Resignation

Provide the following information for each additional owner to be added to the account and/or for each additional owner remaining on the account, OR to update the custodian of a custodial account due to the death or resignation of the current custodian. If there are more than two owners, make a copy of this Section 5 and have ALL owners sign in Section 7b.

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).		
Taxpayer ID Number U.S.-Issued ID Only	Required <input type="checkbox"/> SSN/ITIN <input type="checkbox"/> Entity ID/TIN	Date of Birth MM DD YYYY
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.

☐ Same as NEW owner address in Section 4 ▶ 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

### 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

Form continues on next page. ▶▶

## 6. Account Features

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

### Checkwriting

To add checkwriting, go to [Fidelity.com/checkwriting](https://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 on [Fidelity.com](https://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://Fidelity.com/updateaccountfeatures).

## 7. Signatures and Dates *All REMOVED, CURRENT, and NEW account owners must sign and date.*

**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 (1–7) 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:

*Current account owner(s), trustee(s), custodian(s) and/or legal representative(s) authorizing the 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 account owner(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 you have provided in this form is true, accurate, and complete.

Signatures and Dates continues on next page. ►►



- Understand that “you” refers to all account owners and/or authorized persons, and each of the account owners agrees that any account owner and/or authorized person has authority to act on the account without notice to the other account owners and/or authorized persons. 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 and/or authorized persons 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.
- 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.

*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:*

- 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 text in brackets.*

- 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. ►►



**7a. Owners being REMOVED from account ONLY (Or Trustee or Legal Representative Authorizing Transfer)**

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 7a or 7b; see the "Change of Account Ownership — Information" matrix at the beginning of this form for requirements.

A Medallion signature guarantee may be required if the account balance is more than \$10,000; see the "Change of Account Ownership—Information" 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 REMOVED OWNER NAME	
SIGN	REMOVED OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

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

▼ MEDALLION SIGNATURE GUARANTEE ▼

Signatures and Dates for remaining/new owners continues on next page. ►►



**7b. Owners being ADDED and current owners REMAINING on the account**

*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 7a or 7b; see the "Change of Account Ownership — Information" matrix at the beginning of this form for requirements.

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

▼ MEDALLION SIGNATURE GUARANTEE ▼

PRINT OWNER/TRUSTEE NAME	
SIGN	OWNER/TRUSTEE 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://Fidelity.com/chgacct) or call 800-343-3548.

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