



## 4. Instructions

Units in your current account will be sold and the proceeds will be invested into the account of the new Designated Beneficiary according to the allocation instructions on file for that account. In order to select a different asset allocation mix for these funds, the acting authority on the new Designated Beneficiary's account must call 844-458-2253 and provide instructions. This exchange will not count toward the maximum exchange limit in an ABL account of twice per calendar year.

**Note:** If any portion of your requested transfer exceeds the maximum allowable contribution amount for your new Designated Beneficiary, this request will not be processed. You will be notified if this occurs.

- Check one.  Full Account Transfer  
 Partial Account Transfer

Amount
\$ _____ . _____

If you are requesting a Partial Account Transfer, please detail your liquidation instructions below:

Portfolio Name	Dollar Amount	<input type="checkbox"/> Full Portfolio Distribution
	\$ _____ . _____	<b>OR</b> <input type="checkbox"/> Distribution
Portfolio Name	Dollar Amount	<input type="checkbox"/> Full Portfolio Distribution
	\$ _____ . _____	<b>OR</b> <input type="checkbox"/> Distribution
Portfolio Name	Dollar Amount	<input type="checkbox"/> Full Portfolio Distribution
	\$ _____ . _____	<b>OR</b> <input type="checkbox"/> Distribution
Portfolio Name	Dollar Amount	<input type="checkbox"/> Full Portfolio Distribution
	\$ _____ . _____	<b>OR</b> <input type="checkbox"/> Distribution

## 5. Signature and Date *Person with Signature Authority (PSA) must sign and date. If there is not a PSA, the Designated Beneficiary/Eligible Individual must sign.*

By signing below, you:

- Authorize Fidelity to process this beneficiary change from the ABL account indicated in this instruction.
- Authorize Fidelity to sell units in your current account and transfer the proceeds to an account for your new beneficiary.
- Certify that all information you have provided in this form is true, accurate, and complete.
- Agree to indemnify Fidelity and its affiliates or agents and the Plan from, and hold us 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 your 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 your account.
- Ratify these written instructions and any telephone instructions given pursuant to this authority.
- Understand that all communications with us may be monitored or recorded, and you consent to this monitoring or recording.
- Agree to adopt and be bound by the terms and conditions of the ABL Disclosure Document, Participation Agreement, Customer Agreement, and Account Application as are currently in effect and as may be amended from time to time.
- Acknowledge that if the new Designated Beneficiary is not a "Member of Family" as defined by IRC Section 529A, any earnings of the distribution of assets will be subject to federal income taxes and a 10% federal penalty tax.

PRINT DESIGNATED BENEFICIARY/PERSON WITH SIGNATURE AUTHORITY (PSA) NAME	
DESIGNATED BENEFICIARY/PERSON WITH SIGNATURE AUTHORITY (PSA) SIGNATURE	DATE MM/DD/YYYY
<b>SIGN</b> X	X

Form continues on next page. ►►



**Did you sign the form?** Send the ENTIRE form to Fidelity Investments.

**Questions?** Go to [Fidelity.com/ABLE](https://www.fidelity.com/ABLE) or call 844-458-2253.

**Regular mail**

Fidelity Investments  
PO Box 770001  
Cincinnati, OH 45277-0035

**Overnight mail**

Fidelity Investments  
100 Crosby Parkway KC1K  
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. 779042.2.0 (07/20)*

