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Fidelity INVESTMENTS

Questions on your annuity? Call 800-634-9361.

Ownership/Annuitant Change

Fidelity Personal Retirement Annuity® and Fidelity Retirement Reserves® Annuity

Use this form to add or change an INDIVIDUAL owner or annuitant for your annuity contract. Do NOT use this form to name a TRUST as the contract owner, or to modify beneficiary designations. Type on screen or print out and fill in using 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 change the owner(s) or annuitant(s) of multiple contracts, submit a separate form for each contract.
- You must already be a contract owner or an authorized individual, such as a custodian or trustee, to use this form.
- If you name a *new* contract owner, you must get a signature guarantee on this form for the *current* contract owner.
- Ownership changes can have tax and/or legal consequences. You may want to review this document with a tax, financial, or legal advisor.
- **eDelivery**
  - You can sign up for eDelivery of certain financial information for this annuity. Simply access Fidelity.com/edelivery and click *Sign up for eDelivery* to select your delivery preferences.
  - If you currently hold a Fidelity personal investing account or another annuity, the delivery preferences you have selected for your financial documents will automatically apply to similar documents (as available) for this annuity.
- **Fidelity Personal Retirement Annuity®**
  - You may change the owner, but only to the current owner's spouse.
  - You may only add a non-spouse joint owner if younger than you. You can do this only once, and you cannot change it.
- **Fidelity Retirement Reserves® Annuity**
  - You CANNOT change the owner or annuitant of a qualified annuity (funded with pretax money).
  - You may change the annuitant of a nonqualified annuity (funded with after-tax money) ONLY if it was issued in New York.
  - You may add your spouse as a joint owner. You may add a non-spouse as a joint owner ONLY if your annuity was issued in CA, OR, PA, NY, or VT.

1. Contract to Be Changed

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

Annuity Contract Number

Current Contract Owner / Minor Name

Current Joint Contract Owner / Custodian Name *If applicable.*

2. New Contract Owner

▷ *Skip to Section 3 if you are NOT changing the owner.*

Check only one option, and provide the required information.

- ☐ Remove the current contract owner and replace with a new one.
- ☐ Remove the current contract owner and replace with current joint owner.
- ☐ Remove current custodian; transfer to the minor now of age.

New Contract Owner / Minor

First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

Date of Birth *MM DD YYYY*	Email

Mobile Phone	Secondary Phone	Relationship to Current Primary Owner

Legal/Residential Address

Provide the address used for tax reporting. Cannot be a PO Box, mail drop, or c/o.

Address			
City	State/Province	ZIP/Postal Code	Country

New Contract Owner continues on the next page. ▶▶

Mailing Address

☐ Same as legal/residential address ▷ *Default if no other information indicated below.*

Address			
City	State/Province	ZIP/Postal Code	Country

3. New Joint Owner / Custodian

▷ *Skip to Section 4 if you are NOT changing the joint owner or custodian.*

Check only one option, and provide the required information.

☐ Add a joint owner. *Only one allowed per contract.*
☐ Remove the current joint owner.
☐ Remove the current joint owner and replace with a new one.
☐ Remove the current custodian and replace with a new one.

New Joint Owner / Custodian

First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

Date of Birth *MM DD YYYY*	Email

Mobile Phone	Secondary Phone	Relationship to Current Primary Owner

New Legal/Residential Address

Check one.

☐ Same as current contract owner address
☐ Same as NEW contract owner address ▷ *Default if no other information indicated below.*

Provide the address used for tax reporting. Cannot be a PO Box, mail drop, or c/o.

Address			
City	State/Province	ZIP/Postal Code	Country

New Mailing Address

☐ Same as legal/residential address ▷ *Default if no other information indicated below.*

Address			
City	State/Province	ZIP/Postal Code	Country

4. New Annuitant

▷ *Skip to Section 5 if you are NOT changing the annuitant.*

Check only one option, and provide the required information.

We must have your change of annuitant request in hand at least 30 days BEFORE the annuity date.

Fidelity Personal Retirement Annuity

☐ Keep the current annuitant and add a new annuitant.
☐ Remove the current annuitant and replace with a new annuitant *NOT available for trusts.*
☐ Remove a joint annuitant.

Retirement Reserves Annuity *MUST have been issued in New York and be a nonqualified account*

☐ Keep the current annuitant and add a contingent annuitant.
☐ Remove the current annuitant and replace with a contingent annuitant. *One-time-only change. Not available for trusts.*

Individual Being Removed *If applicable.*

Name

New Annuitant continues on the next page. ▶▶

New Annuitant

First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

Date of Birth *MM DD YYYY*	Relationship to Current Primary Owner

Legal/Residential Address

Check one.

- ☐ Same as current contract owner address
- ☐ Same as NEW contract owner address ▷ *Default if no other information indicated below.*

Provide the address used for tax reporting. Cannot be a PO Box, mail drop, or c/o.

Address			
City	**State/Province**	**ZIP/Postal Code**	**Country**

Mailing Address

- ☐ Same as legal/residential address ▷ *Default if no other information indicated below.*

Address			
City	**State/Province**	**ZIP/Postal Code**	**Country**

5. Contract Owner(s) Signature and Date *Form cannot be processed without signature and date of all CURRENT and NEW contract owners.*

By signing below, you:

Current contract owners being removed

- Authorize Fidelity to act on all instructions given on this form, and you understand how they will affect your contract.
- Affirm that you have read and understand your contract.
- Certify that all information you provided is correct to the best of your knowledge.
- Understand that your instructions will be effective as of the date your signed form has been accepted at the Annuity Service Center.

New contract owner(s)

- Affirm that you are at least 18 years old.
- Affirm that you have read and understand the contract for this annuity.
- Certify that all information you provided is correct to the best of your knowledge.

- Certify under penalties of perjury that you are a U.S. person (including a U.S. resident alien) 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 of the bracketed text, at right. ▶

- [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.]

Contract Owner(s) Signature and Date continues on the next page. ▶▶

5a. Owners REMAINING on the contract or being REMOVED from contract ONLY

Who must sign?

All owners remaining on the contract after the change AND all owners being **removed** from the contract:

- Owner and Joint Owner (if applicable)
- All Trustees (if changing from Trust ownership)
- Custodian (if UGMA and minor coming of age)

Do I need a Medallion Signature Guarantee?

YES, for the following owners, a Medallion Signature Guarantee is required in the box next to your signature.

- Any owners being removed
- Remaining owner ONLY if a new owner is being added

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/Authorized Individual Being Removed/Remaining Name

MEDALLION SIGNATURE GUARANTEE

SIGN

Signature X

Date *MM DD YYYY*

Print Joint Owner/Authorized Individual Being Removed/Remaining Name

MEDALLION SIGNATURE GUARANTEE

SIGN

Signature X

Date *MM DD YYYY*

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

Guarantor Name	Phone	Extension

5b. Owners being ADDED to the contract

Who must sign in this section?

- All new owners (owner and joint if applicable)
- A minor who is now of age on an UGMA
- Exception: New annuitants do not need to sign

Print New Owner Name

SIGN

Signature X

Date *MM DD YYYY*

Print New Joint Owner Name

SIGN

Signature X

Date *MM DD YYYY*

Did you sign the form? Send the ENTIRE form to Fidelity Investments. After the changes are registered, the contract owner will receive a Revised Annuity Profile.

Questions? Call 800-634-9361.

Regular Mail *Except NY*	Regular Mail *NY only*	Overnight Mail
Annuity Service Center PO Box 770001 Cincinnati, OH 45277-0050	Annuity Service Center PO Box 770001 Cincinnati, OH 45277-0051	Fidelity Investments 100 Crosby Parkway, KC2Q Covington, KY 41015

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