

# Address/Name Change—Annuities

Use this form to notify Fidelity that the name, address, or phone number of a contract owner or authorized individual has changed. 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

- You must already be a contract owner or an authorized individual (trustee, custodian, etc.) in order to change a name or the address on an account.
- Changes requested on this form will be made on all Fidelity annuities you own or are an authorized individual on.
- You must either:
  - attach a photocopy of a marriage certificate, divorce decree, or other court document showing your new name
  - get a signature guarantee

## 1. Contract Owner/Authorized Individual

Owner Name	Annuity Contract Number
Joint Owner/Authorized Individual Name	

## 2. New Address of Contract Owner(s)

### 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
Evening Phone	Daytime Phone	Extension	

### Mailing Address

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

Address			
City	State/Province	Zip/Postal Code	Country

## 3. New Address of Joint Owner/Authorized Individual

Complete ONLY if a joint owner/authorized individual has a separate address. Addressee must already be an owner/authorized individual.

Addressee <i>If different than above</i>
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### 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
Evening Phone	Daytime Phone	Extension	

## Mailing Address

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

Address			
City	State/Province	Zip/Postal Code	Country

## 4. Contract Owner/Authorized Individual Name Change

Attach a photocopy of a marriage certificate, divorce decree, or other court document showing the new name or get a signature guarantee.

### Former Name

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

First Name	M.I.	Last Name
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## 5. Signature and Date *Owner(s)/authorized individual(s) requesting change must sign and date.*

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 to the best of your knowledge.

**A Medallion Signature Guarantee is required** for a name change if no court document is available. You can get a Medallion Signature Guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.

Print Owner Name	
Owner / Authorized Individual Signature	Date MM-DD-YYYY
<b>SIGN</b> ▷	▷

▼ MEDALLION SIGNATURE GUARANTEE ▼

Print Joint Owner / Authorized Individual Name	
Joint Owner / Authorized Individual Signature	Date MM-DD-YYYY
<b>SIGN</b> ▷	▷

▼ MEDALLION SIGNATURE GUARANTEE ▼

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

Guarantor Name	Phone	Extension
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**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 Account Profile.

**Questions?** Call 1-800-634-9361.

**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  
100 Crosby Parkway, KC2Q  
Covington, KY 41015

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