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Fidelity INVESTMENTS

Questions? Go to Fidelity.com/autoinvest or call 1-800-634-9361.

Automatic Annuity Builder

Fidelity Personal Retirement Annuity and Fidelity Retirement Reserves Annuity

Use this form to establish, update, or delete an automatic annuity builder program for your Fidelity annuity contract. Type on screen or print out and fill in using CAPITAL letters and black ink. Need more room for information or signatures? Use a copy of the relevant page.

Helpful to Know

- To make automatic investments into more than one annuity, use a separate form for each contract.
- The automatic annuity builder program is not available if your Retirement Reserves annuity was issued in New York.
- If you need to skip a month, you must notify Fidelity no later than 10 business days before the scheduled payment.

1. Contract Owner(s)

Trust and UGMA/ UTMA Accounts: *Provide names of authorized individuals in the Contract Owner fields.*

Phone numbers will be used if we have questions, but will not be used to update your account information.

Contract Owner Name

Joint Contract Owner Name *if applicable*

Trust or Entity Name *if applicable*

Evening Phone | Daytime Phone | Extension

2. Contract Receiving Investments

Provide contract number and check ONLY one. For any other type of request (such as modifying an existing plan), send us a letter of instruction.

Fidelity Annuity Contract Number

☐ ADD this new automatic investment plan and leave any existing plans in place. ▷ *Default if no choice indicated. Complete all sections of this form.*

☐ REPLACE any existing automatic investment plan(s) with the plan described on this form. ▷ *Complete all sections of this form.*

☐ DELETE all existing automatic investing plans on this form and DO NOT ADD any new plan. ▷ *Skip to Section 6.*

3. Source Account for Investments

This Fidelity Nonretirement Account

NOT available for Mutual Fund Accounts.

Account Number

*The source account and the receiving contract must have at least **one owner in common.** Investments from a brokerage account will be debited from the core position only.*

By Electronic Funds Transfer (EFT)

Allows you to electronically transfer funds between your bank or other financial institution and Fidelity. Must be completed for all automatic investments coming from outside Fidelity.

Check no more than one option and suboption, and provide required information.

☐ EFT from bank or credit union account using instructions ALREADY IN PLACE on the contract.

Bank Account Number | Bank Name

Source Contract for Investments, By Electronic Funds Transfer continues on next page. ▶▶

☐ Set up EFT from bank or credit union account. *Your annuity contract and nonannuity account must have at least one owner's name in common. Allow 4 business days for setup.*

☐ Checking ▷ *Attach voided check (MUST have your full name preprinted on it). Deposit slip NOT accepted.*

☐ Savings ▷ *Attach deposit slip (MUST have your full name preprinted on it) or bank statement.*

Ask your bank for the correct routing number. ▶

If you do not attach a voided check, or a savings deposit slip or bank statement, you MUST obtain a Medallion signature guarantee in Section 6.

Bank Routing Number *Nine digits, starts 0, 1, 2, 3, or 4.*	Bank Name
Checking or Savings Account Number	**Checking or Savings Account Owner Name**

4. Amount and Frequency

We may sometimes make investments later than the date you request in this section. Examples include investments that are scheduled for a day when the stock market is closed or for a day that is a nonbusiness day. Subsequent investments will occur on the same day of the month as the investment date that you select below.

Check ONLY one and provide amount and start date.

☐ Annually
☐ Semiannually
☐ Quarterly
☐ Monthly

Transfer Amount *Must be at least $100.*	Start Date *MM DD YYYY*	End Date *MM DD YYYY Optional.*
$		

Dates MUST be between the 1st and the 28th of the month indicated.

5. Invest in These Funds

Depending on your choice in this section, we will invest your assets according to the premium allocation that is on file for the receiving contract OR invest only in the annuity funds and percentages that you specify (and update your premium allocation). **Note: You can have only one premium allocation on file at a time.**

Check one and provide any required information.

☐ Use the premium allocation ON FILE for the receiving contract. ***May differ from the contract's current portfolio allocation.***

☐ REPLACE the premium allocation on file and invest in these funds at these percentages:

Annuity Fund Name	Symbol/Fund Number	Percentage
		%
		%
		%
		%
		%

Total must add up to 100%. 0 %

Form continues on next page. ▶▶

6. Signature and Date *ALL contract owners must sign and date.*

By signing below, you:

- Authorize and request Fidelity Investments Life Insurance Company and its agents, affiliates, employees or successor custodians (Fidelity) to make the deposits, and investments indicated on this form to and from the accounts indicated in Sections 2 and 3.
- Certify that all information you provided is correct to the best of your knowledge.
- Agree to pay any transaction fees your bank may charge in connection with transactions involved in electronically transferring money from your bank to your contract.
- Authorize Fidelity to act on all instructions given on this form.
- Understand 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.

Customers requesting EFTs:

- Authorize Fidelity to make, and the bank to accept, electronic payments between this contract and the bank account identified in Section 3 (or by attached voided check or deposit slip), by initiating credit or debit entries to the bank account according to valid instructions from you or any other owner or authorized party.

A Medallion signature guarantee is required if *setting up EFT and no check, savings deposit slip, or bank statement is attached. 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

DATE — Date *MM DD YYYY*

SIGN — Owner Signature

MEDALLION SIGNATURE GUARANTEE

Print Joint Owner Name

DATE — Date *MM DD YYYY*

SIGN — Joint Owner Signature

MEDALLION SIGNATURE GUARANTEE

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

Guarantor Name	Phone	Extension

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 Annuity Profile."

Questions? Go to Fidelity.com/autoinvest or call 1-800-634-9361.

Regular Mail *Except NY*
Annuity Service Center
P.O. Box 770001
Cincinnati, OH 45277-0050

Regular Mail *NY only*
Annuity Service Center
P.O. Box 770001
Cincinnati, OH 45277-0051

Overnight Mail
Fidelity Investments
100 Crosby Parkway, KC2Q
Covington, KY 41015

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