

Householding

Use this form to group accounts so that all owners are eligible for service and pricing benefits. Type on screen or print out and fill in. For best results, use CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Helpful to Know

- Accounts do not all have to be at the same address in order to be included.
- **Accounts eligible for householding**
 - Individual/Joint, including Transfer on Death registrations
 - Trust
 - UGMA/UTMA (custodial)
 - IRA (Traditional, Roth, Rollover, Inherited, SEP, SIMPLE)
 - Fidelity Retirement Plan (Keogh)¹
 - 529 College Savings Plan
 - Fidelity BrokerageLink® accounts whose account number begins with 650¹
 - Employee Stock Option Plan (ESOP)
 - Fidelity Private Client Group®
 - Portfolio Advisory Services®
 - Fidelity Retirement Reserves® Annuities
 - 401(k), 403(b), 457 or other workplace retirement plans¹
- **Accounts NOT eligible for householding**
 - Business, sole proprietor, partnership or other entity accounts (except trusts)
 - Health Savings Accounts (HSA)²
 - Non-prototype retirement plans
- To combine statements and mailings for multiple accounts at one address, use the Combined Statement/Mailings form.
- Potential service and pricing benefits include fee waivers, cash management features, publications, and guidance.
- Portfolio Advisory Services customers: this form will not combine assets for purposes of calculating your PAS advisory fee. Use the Account Aggregation Form to do that.

¹ Fiduciaries of ERISA-governed retirement plans: see last bullet in section 3.

² For pricing benefits, non-HSA assets can benefit HSA accounts but HSA assets cannot benefit other types of accounts.

1. Account Owners

ALL owners of ALL accounts must be listed here.
Trust and UGMA/UTMA Accounts:
Provide names of authorized individuals.

Name
Name
Name
Name

2. Accounts Included Check ONLY one option.

If you chose this option, provide SSN/TIN for each owner listed above, then skip to Section 3.

ALL eligible accounts associated with the following numbers:

Social Security or Taxpayer ID Number	Social Security or Taxpayer ID Number
Social Security or Taxpayer ID Number	Social Security or Taxpayer ID Number

If you chose this option, we will ONLY combine mailings for the account numbers listed here.

See "Helpful to Know" to be sure each account you list is eligible.

ONLY these accounts:

Account Number	Account Number	Account Number
Account Number	Account Number	Account Number
Account Number	Account Number	Account Number



3. Signatures and Dates *Account owner(s)/authorized individuals 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.
- Acknowledge that Fidelity may add, modify, or withdraw any service and pricing benefits at any time, and that submitting this form does not automatically entitle you to any particular service or pricing advantages.
- Represent that, to the extent you are consolidating assets from an ERISA-governed retirement plan in your "household", you are not a plan fiduciary with the authority to select or terminate Fidelity as a plan service provider.

Print Owner/Authorized Individual Name	
Owner/Authorized Individual Signature	Date MM - DD - YYYY
SIGN ▶	▶

Print Owner/Authorized Individual Name	
Owner/Authorized Individual Signature	Date MM - DD - YYYY
SIGN ▶	▶

Print Owner/Authorized Individual Name	
Owner/Authorized Individual Signature	Date MM - DD - YYYY
SIGN ▶	▶

Print Owner/Authorized Individual Name	
Owner/Authorized Individual Signature	Date MM - DD - YYYY
SIGN ▶	▶

Did you print and sign the form? Send the form to Fidelity.
Questions? Go to fidelity.com/householding or call 1-800-544-6666.

Use postage-paid envelope OR deliver to:

Regular mail Fidelity Investments PO Box 770001 Cincinnati, OH 45277-0002	Overnight mail Fidelity Investments 100 Crosby Parkway KC1K Covington, KY 41015
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On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates.
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