



# Remove a Joint Account Owner

Use this form to remove an account owner from a joint Brokerage, Mutual Fund Only, or Fidelity® Cash Management Account. Do NOT use this form for a Fidelity Managed Account, or to add an account owner. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

## Helpful to Know

- This form can be used in two situations:
  - to remove one joint owner from any type of joint account (not due to death)
  - to remove an owner due to death from a Joint with Right of Survivorship or Tenants by Entirety account
- To remove an owner due to death from an account registered as Tenants in Common or Community Property, complete a *Change of Account Registration* request. Visit [Fidelity.com/forms](https://www.fidelity.com/forms) to complete the request.
- The remaining owner must be the primary account owner (the owner whose Social Security number is the tax reporting number on the account) in order to use this form. If the remaining owner is not the primary account owner or the primary account owner is deceased, complete the *Change of Account Registration* request to designate a new primary account owner.
- If the remaining owner is the sole account owner, the account registration will change to an individual account.
- If you are removing a joint owner due to death, you must attach a copy of the death certificate and an inheritance tax waiver if required by the decedent's state of residence.
- If you have the ability to write a check on this account (even if you've never written one), you must also complete a new *Checkwriting* form to remove the joint owner from the associated signature card. Visit [Fidelity.com/checkwriting](https://www.fidelity.com/checkwriting) to complete the request.
- If a debit card has been issued to the joint owner who is being removed from the account, you may call the number on the back of the card at any time to request the card be closed. If the debit card remains open after the joint owner has been removed, the debit card will be deactivated.
- If the joint account has a designated beneficiary, it will remain the same once an owner is removed.
- If your account currently has the margin and/or options features, the remaining owner will need to reapply.

## 1. Account Owner Remaining on Account

This phone number may be used if we have questions, but will not be used to update your account information.

Name		Account Number			
Daytime Phone	Extension				

## Citizenship

Indicate your citizenship status.

U.S. citizen

Foreign citizen Information in this box must be completed.

Permanent U.S. resident     Non-permanent U.S. resident     Nonresident of U.S.

Country of Citizenship	Country of Tax Residency Only applicable to nonresidents of the U.S.
City, State/Province, and Country of Birth	

Check one and attach a copy of a valid and unexpired government ID showing number and photo. To claim non-U.S. tax status, also complete and submit an IRS Form W-8BEN.

Passport

Employment Authorization Document

DHS Permanent Resident Card

Foreign National Identity Document

## 2. Account Owner to Be Removed

Name
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Form continues on next page. ►►



### 3. Signatures and Dates *ALL account owners, including any living owner being removed from the account, must sign and date.*

In this form, "You," "you," and "your" refer to all account holders.

By signing below, you:

- Acknowledge that by removing an owner, you are changing the ownership interests you and others have on this account and/or removing individuals authorized to transact business or access this account.
- Authorize Fidelity Brokerage Services LLC (Fidelity) to remove an owner from the above-noted account and to act on all instructions given on this form.
- Understand that all other information and instructions provided on the original application related to this account remain unchanged and are incorporated.
- Certify that all information you have provided in this form is true, accurate, and complete.

#### 3a. Account Owner to be REMOVED

If the account owner is deceased, provide a copy of the death certificate and an inheritance tax waiver if required by the decedent's state of residence in lieu of signature.

**A Medallion signature guarantee is required for the account owner being removed if the value of the account is greater than \$100,000.**

*If the form is completed at a Fidelity Investor Center with all signers present, the Medallion signature guarantee is not required. You can get a Medallion signature guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a Medallion signature guarantee.*

	PRINT OWNER NAME
SIGN	OWNER SIGNATURE X
DATE	TODAY'S DATE MM/DD/YYYY X

▼ MEDALLION SIGNATURE GUARANTEE ▼

#### 3b. Owners REMAINING on Account

	PRINT OWNER NAME
SIGN	OWNER SIGNATURE X
DATE	TODAY'S DATE MM/DD/YYYY X

	PRINT OWNER NAME
SIGN	OWNER SIGNATURE X
DATE	TODAY'S DATE MM/DD/YYYY X

**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?** Go to [Fidelity.com/chgacct](http://Fidelity.com/chgacct) or call 800-343-3548.

**Regular mail**

Fidelity Investments  
PO Box 770001  
Cincinnati, OH 45277-0039

**Overnight mail**

Fidelity Investments  
Account Reregistration Services  
100 Crosby Parkway KC1C  
Covington, KY 41015

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