

# Fidelity SIMPLE IRA—Request to Remove Terminated Participants

Use this form to remove a terminated participant from your company's SIMPLE IRA plan. Complete this form using CAPITAL letters and black ink. If you need more room for participant information, use a copy of the relevant page.

## Helpful to Know

- Provide the name and account number for all participants you are requesting to remove from your plan at this time.
- All employer and/or employee contributions **must** be deposited to the respective account(s) prior to submitting this form.
- You will not have access to make contributions to any participant account(s) that have been removed from your company's SIMPLE IRA Plan.
- Once this request is complete, the participant's account(s) will be moved to the Fidelity Terminated Participant SIMPLE IRA, and a letter will be sent to the participant(s) confirming this change.
- For faster processing, this completed form can also be faxed to the attention of the Fidelity SIMPLE Service Team at **800-347-2779**.

## 1. Company Information

Company Name		Plan Tax ID Number	
Company Mailing Address			
City	State/Province	ZIP/Postal Code	Country
Authorized Individual Name		Daytime Phone	Extension

## 2. Terminated Participant Information

Participant Name	Account Number

Terminated Participant Information continues on next page. ►►

2. Terminated Participant Information, continued

Participant Name	Account Number

3. Signature and Date Required

By signing below, you:

- Certify that all employer and/or employee contributions have been deposited into the respective participant account(s) at this time, and to the best of your knowledge.

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

**Did you sign the form?** Send the form to Fidelity.  
**Questions?** Call 1-800-544-5373, option 3.

*Use a postage-paid envelope, OR deliver to:*

<b>Regular mail</b> Fidelity Investments Attention: SIMPLE Service Team P.O. Box 770001 Cincinnati, OH 45277-0038	<b>Overnight mail</b> Fidelity Investments Attention: SIMPLE Service Team 100 Crosby Parkway Mailzone: KC1D Covington, KY 41015
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