Print Reset Save

Questions? Call 800-544-5373.

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 removed from your plan manager page. A letter will be sent to the participant confirming they have been disassociated from the plan.
- 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			Primary Phone

2. Terminated Participant Information

Participant Name	Account Number

Participant Name	Account Number

Participant Name	Account Number

Participant Name	Account Number

Participant Name	Account Number

Participant Name	Account Number

Participant Name	Account Number

Terminated Participant Information continues on next page. ▶▶

Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
Participant Name	Account Number
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*
SIGN X	

Did you sign the form? Send the form to Fidelity.
Questions? Call 800-544-5373.

Regular mail
Fidelity Investments
Attention: SIMPLE Service Team
PO Box 770001
Cincinnati, OH 45277-0038

Overnight mail
Fidelity Investments
Attention: SIMPLE Service Team
100 Crosby Parkway
Mailzone: KC1D
Covington, KY 41015