



Transfer/Rollover Form Instructions

Reference the instructions below while completing the form. For additional assistance, please contact Fidelity Investments at 1-800-343-0860 or for the hearing impaired (TTY) 1-800-259-9743, Monday through Friday, 8:00 A.M. to midnight ET.

1. YOUR INFORMATION

Please provide your information in this section.

2. INVESTMENT PROVIDER YOU ARE MOVING MONEY FROM

Please review your most recent statement for this name and address, and include a copy of the statement with this form. **Please contact your previous investment provider to see if additional paperwork is required.**

3. ACCOUNT(S) OR CONTRACT(S) TO MOVE

Account or Contract Number: This number is available on your Previous Investment Provider account statement. If you are unable to locate this number on your statement, please contact the Investment Provider. If you do not provide an account or contract number, we will use your Social Security number to request the assets to be moved.

The Account or Contract Number above is from: Please choose only one of the options listed. If you choose 'A Previous Employer,' provide the name of that employer.

Type of Account or Contract: If you are unsure of the type of account or contract, please contact the Previous Investment Provider or refer to your statement. Select at least one.

Liquidation Amount: Specify the amount of money you want moved to your Fidelity account. If you choose 'Full Liquidation/100%,' Fidelity will request your full balance. If you choose 'Partial Liquidation,' Fidelity will request the dollar amount or percentage you specify.

If you do not specify an amount, Fidelity will move/liquidate 100%. If you are transferring 457(b) money, please be aware that governmental 457(b) money must be transferred into a governmental 457(b) plan and tax-exempt 457(b) money must be transferred into a tax-exempt 457(b) plan.

4. YOUR FIDELITY ACCOUNT INFORMATION

If you do not have a retirement account through Fidelity for the employer listed here, you must complete the enrollment process. For help with enrollment, please contact a Fidelity representative at 1-800-343-0860.

Employer sponsoring your Fidelity retirement account: The employer name appears on your Fidelity account statement or in your enrollment paperwork.

Plan Number: Please provide the Plan Number if you have multiple retirement plan accounts with Fidelity. Please contact Fidelity at 1-800-343-0860 to obtain the Plan Number.

Type of account with this employer: This information is required to ensure Fidelity credits your assets to the proper account. Please contact Fidelity at 1-800-343-0860 or for the hearing impaired (TTY) 1-800-259-9743 if you do not know your type of account.

5. INVESTMENT INSTRUCTIONS

Would you like the assets invested in your current investment selection? If 'Yes' is selected, Fidelity will credit your money to the investment selection currently specified for your account. If you do not select 'Yes,' please list the fund names, fund codes (if known) and percentages. **Please ensure that the percentages equal 100%.** Please list additional funds on a separate page and attach it to this form.

Fund Name: List the Fund Name(s) you want your assets credited to.

Fund Code: Provide the four-digit Fund Code(s) (if known).

Percentage: Please ensure that the percentages listed equal 100%.

Note: If the funds selected are unclear, unavailable, or equal less than 100%, the percentages allocated to those funds and/or any unallocated percentage will be defaulted to an investment option selected by your employer or as specified in the custodial account agreement. If the percentages listed exceed 100%, the entire amount will be defaulted.

6. EMPLOYER PLAN ACCEPTANCE

Employer Authorized Signature: An authorized signature from the employer that sponsors your Fidelity retirement account **may be required**. To verify if this section needs to be signed, contact your Human Resources office, or a Fidelity Representative at 1-800-343-0860 or for the hearing impaired (TTY) 1-800-259-9743.

7. YOUR SIGNATURE

Your Signature: Please read the legal information provided in this section and then sign the form. We are unable to process your request without your signature.

Transfer/Rollover Checklist:

Here is a checklist to ensure that your request is in good order.

Please remember to:

- Include your most recent account statement from the Previous Investment Provider
- Indicate the amount or percentage of money you are moving to Fidelity
- Obtain the Employer Authorized Signature (contact your Human Resources office or Fidelity to verify if this is required)
- Sign the form
- Return this form in the enclosed postage-paid envelope **OR**

Return to:

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0090

If you are sending this using an overnight delivery service, please send to this address:

Fidelity Investments
100 Crosby Parkway, Mailzone KC1E
Covington, KY 41015

Please contact your previous investment provider to see if additional paperwork is required.



Transfer/Rollover Form

Instructions: Use this form to move assets to your Fidelity employer-sponsored retirement account from a previous investment provider. You may also use this form to consolidate multiple employer-sponsored retirement accounts currently at Fidelity. **If you do not have a retirement account with Fidelity, you must also complete an Account Application/Enrollment Form. An incomplete form may delay the processing of your request.**

Unless otherwise instructed by your employer, please return this transfer/rollover form in the postage-paid envelope provided **OR**

Return to:

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0090

If you are sending this using an overnight delivery service, please send to this address:

Fidelity Investments
100 Crosby Parkway, Mailzone KC1E
Covington, KY 41015

Questions? Call Fidelity Investments at 1-800-343-0860 or for the hearing impaired (TTY) 1-800-259-9743, Monday through Friday, 8 A.M. to midnight ET, for assistance with completing this form.

1. YOUR INFORMATION

Please use a **black** pen and print clearly in **CAPITAL LETTERS**.

Social Security #: -- Date of Birth: --

First Name:

Last Name:

Street Address:

City: State:

Zip: - E-mail address:

Daytime Phone: -- Evening Phone: --

2. INVESTMENT PROVIDER YOU ARE MOVING MONEY FROM

Name of investment provider you are moving money from
(e.g., VALIC, TIAA-CREF, Vanguard, ING, Lincoln):

Please include a copy of your most recent account statement from your investment provider.

Street Address:

City: State:

Zip: -

Phone: --

Please contact your previous investment provider to see if additional paperwork is required.



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3. ACCOUNT(S) OR CONTRACT(S) TO MOVE

Please provide information about the account(s)/contract(s) you wish to move to Fidelity. If no account or contract numbers are provided, we will use your Social Security number to request the assets to be moved. Please make additional copies of this page if you have more than two accounts/contracts to move.

3A. FIRST ACCOUNT (if more than one account, please complete section 3B):

Account or Contract Number:

The Account or Contract Number above is from:

- The same Employer as my Employer Plan with Fidelity
 A previous Employer (List the Employer Plan name)
 A Traditional or SEP IRA
 A Rollover IRA

Type of Account or Contract: (select at least one)

- 403(b) 401(a)/(k) 457(b) IRA

Liquidation Amount: (select one)

- Full Liquidation/100%
 Partial Liquidation % OR \$

Unless otherwise specified, we will move/liquidate 100%.

3B. SECOND ACCOUNT (if applicable).

Account or Contract Number:

The Account or Contract Number above is from:

- The same Employer as my Employer Plan with Fidelity
 A previous Employer (List the Employer Plan name)
 A Traditional or SEP IRA
 A Rollover IRA

Type of Account or Contract: (select at least one)

- 403(b) 401(a)/(k) 457(b) IRA

Liquidation Amount: (select one)

- Full Liquidation/100%
 Partial Liquidation % OR \$

Unless otherwise specified, we will move/liquidate 100%.

4. YOUR FIDELITY ACCOUNT INFORMATION

If you do not have a retirement account through Fidelity for the employer listed here, you must complete the enrollment process. For help with enrollment, please contact a Fidelity representative at 1-800-343-0860.

Employer sponsoring your Fidelity retirement account:

(This name appears on your Fidelity statement, or in your enrollment paperwork.)

Plan Number (if known):

OR City & State of Employer:

Type of account with this employer: 403(b) 401(a)/(k) 457(b)

If you do not know the type of account, please contact your Fidelity representative at 1-800-343-0860.

5. INVESTMENT INSTRUCTIONS

Would you like the assets invested in your current investment selection? Yes If no, specify below:

Fund Name:

OR

Fund Code:

OR

OR

OR

Percentage:

			%
			%
			%
			%

Total = 100%

If no investment options are selected, the assets will be allocated to your current investment selection. The transfer or rollover will be allocated to your current investment election on file with Fidelity for the Plan unless you complete the above Investment Instructions. Your entire contribution will be invested in the Plan's default fund **when the Investment Instructions are incomplete or if you select a Fund that is not available.**

6. EMPLOYER PLAN ACCEPTANCE

An authorized signature from the employer that sponsors your Fidelity retirement account **may be required.** To verify if this section needs to be signed, contact your Human Resources office, or a Fidelity Representative at 1-800-343-0860 or for the hearing impaired (TTY) 1-800-259-9743.

Employer Authorized Signature:

Date:

Employer Authorized Printed Name:

7. YOUR SIGNATURE

By signing this form:

- I hereby agree to the terms and conditions stated in this Form and certify that I am requesting a rollover or transfer of my retirement plan assets in accordance with applicable IRS and plan rules.
- I certify under the penalties of perjury that my Social Security number on this form is correct.
- I acknowledge that I have read the prospectus(es) for any mutual fund in which I invest and agree to the terms.
- I hereby direct the investment provider identified on this form to liquidate the designated amount of the account(s) listed on this form, and to release the proceeds to my account under my employer's plan, except to the extent my current employer or any of my former employers prohibit such release. In the event of such prohibition, I hereby direct said investment provider to retain the nontransferable portion of my account(s) in a separate account or contract and to release the remainder.
- I hereby agree that if my assets will be sent to Fidelity in installments, the first installment may be invested according to my instructions on this form. All subsequent installment payments as well as any residual balances not received within 30 days will be invested according to my current investment elections at the time my assets are received by Fidelity.

For 403(b)-to-403(b) transfers (not rollovers)

- I understand that any balances I am transferring from a 403(b)(1) annuity into a 403(b)(7) custodial account may be subject to more restrictive withdrawal provisions.
- I direct Fidelity to treat all monies as pretax contributions made subsequent to 12/31/88 unless my prior investment provider provides Fidelity with account balances as of 12/31/88 and post-1988 salary reduction contributions.
- I understand that if I transfer a contribution source that is not allowed by the Plan, the value associated with the unacceptable source will be returned to the investment provider named in Section 2.
- I direct Fidelity to treat the entire balances as subject to minimum distribution requirements unless my prior investment provider provides Fidelity with account balances as of 12/31/86.
- I direct Fidelity to allocate the entire balance to the most restrictive source in the current employer's plan unless my prior investment provider provides Fidelity with the sources of the transferred amount under the previous plan.

Your Signature:

Date:



Please sign here!

Transfer/Rollover Checklist:

Here is a checklist to ensure that your request is in good order.

Please remember to:

- Include your most recent account statement from the Previous Investment Provider
- Indicate the amount or percentage of money you are moving to Fidelity
- Obtain the Employer Authorized Signature (contact your Human Resources office or Fidelity to verify if this is required)
- Sign the form
- Return this form in the enclosed postage-paid envelope **OR**

Return to:

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0090

If you are sending this using an overnight delivery service, please send to this address:

Fidelity Investments
100 Crosby Parkway, Mailzone KC1E
Covington, KY 41015

Please contact your previous investment provider to see if additional paperwork is required.

Fidelity Acceptance of Transfer/Rollover (FIDELITY INTERNAL USE ONLY):

INFORMATION REQUESTED OF TRANSFERRING INVESTMENT PROVIDER

Please provide the following information on the check:

- FBO
- Social Security number

Please make the check payable to **Fidelity Management Trust Company** and return it to:

Fidelity Investments, P.O. Box 770002, Cincinnati, OH 45277-0090

In addition please provide the following either on the check or by separate letter:

1. For hardship distribution restriction:

- Account balance as of 12/31/88
- Post-1988 salary reduction contributions
- Post-1988 non-salary reduction contributions (e.g., employer monies)

2. For minimum distribution requirements 403(b) plan transfers:

- Account balance as of 12/31/86

3. Please provide the dollar amount or percentage of the breakdown of each money type being transferred.

- Portion of transfer — employee pre-tax
- Portion of transfer — employee after-tax
- Portion of transfer — employer matching

For Internal Use Only

Fidelity Investments hereby agrees to accept the transfer/rollover described above for deposit in the 403(b)/401(a)/401(k)/ 457(b) Account established on behalf of the individual.

Authorized Signature:

X

Date:

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