



Account Number



Partial Delivery Account Transfer Request

Nonretirement

Use this form to authorize Fidelity Brokerage Services LLC ("Fidelity") to initiate a partial delivery transfer of assets from your account at Fidelity to a Receiving Firm. You may need to contact the Receiving Firm to complete a transfer form for full delivery and/or retirement transfers. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Authorized agent/Advisor

Firm Name	G Number
	G

1. Account Information

Provide all information requested.

Account Name	
Social Security/Taxpayer ID Number	Required
	<input type="checkbox"/> SSN <input type="checkbox"/> TIN

2. Delivery Instructions

Complete to have eligible securities transferred OUT of your Fidelity account. Select the appropriate transfer type. If you do not select a transfer type, this request will default to a Non-Gift Transfer.

- Check one. ►
- ☐ Non-Gift Transfers
 - ☐ Inheritance
 - ☐ Gift Transfers
 - ☐ Donor to be Anonymous

Receiving Firm Name	DTC Number
Receiving Account Name	Receiving Account Number
Recipient's Registration Type	

continued on next page



2. Delivery Instructions *continued*

Enter specific share identification, if applicable. The client must provide the lot acquisition date and cost for specific share instructions on or before the date of this transfer request. To list more securities, include this information on an attached letter of instruction. Important: The letter of instruction must be signed and dated by the account owner on or before the date of the transfer request.

Enter one of the following values into the Choose Specific Disposal Method Override field(s) as applicable below.

FIFO: First in, First out

HICO: High cost in, First out

HICL: High cost in, First out, Long-term

HICS: High cost in, First out, Short-term

INFI: Intraday First in, First out

LIFO: Last in, First out

LOCL: Low cost in, Long-term

LOCO: Low cost in, First out

LOCS: Low cost in, Short-term

Enter specific share information or enter another disposal method in the Override field(s).

Mutual Fund Account Number		BIN	
CUSIP or Symbol	Number of Shares/ALL	<input type="checkbox"/> ALL	
Provide Lot information		Choose Specific Disposal Method	
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method	Override to
\$.	<input type="checkbox"/> Default to Account Level	<input type="checkbox"/>

Mutual Fund Account Number		BIN	
CUSIP or Symbol	Number of Shares/ALL	<input type="checkbox"/> ALL	
Provide Lot information		Choose Specific Disposal Method	
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method	Override to
\$.	<input type="checkbox"/> Default to Account Level	<input type="checkbox"/>

Mutual Fund Account Number		BIN	
CUSIP or Symbol	Number of Shares/ALL	<input type="checkbox"/> ALL	
Provide Lot information		Choose Specific Disposal Method	
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method	Override to
\$.	<input type="checkbox"/> Default to Account Level	<input type="checkbox"/>

Mutual Fund Account Number		BIN	
CUSIP or Symbol	Number of Shares/ALL	<input type="checkbox"/> ALL	
Provide Lot information		Choose Specific Disposal Method	
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method	Override to
\$.	<input type="checkbox"/> Default to Account Level	<input type="checkbox"/>

3. Direct Registration Shares

If you want to receive a physical certificate, you must contact your Transfer Agent after the shares have been transferred.

Provide the following information to have eligible securities transferred out of your Fidelity account.

Receiving Account Name/Title			
Recipient's Physical Address			
City	State/Province	Zip/Postal Code	Social Security Number

4. Signature and Date *Form cannot be processed without signature and date.*

By signing this form, you:

- Authorize Fidelity Brokerage Services LLC ("Fidelity"), in accordance with the instructions above, to initiate a partial delivery transfer of assets from your account at Fidelity to the Receiving Firm named above. You agree to indemnify and hold harmless Fidelity and its affiliates and their respective officers, directors, employees, and agents from and against any and all losses, costs, claims, or financial obligations for acting upon the above instructions or if the information provided on this form to Fidelity is inaccurate, erroneous or fraudulent.
- Understand you must complete the Receiving Firm's transfer form for full delivery transfer requests and all retirement transfers. Any non-ACAT mutual fund transfer must include the receiving account number at the fund company. Transfers will be initiated within 24 hours. If the Receiving Firm is a National Securities Clearing Corporation (NSCC) ACAT participating member, the Receiving Firm will need to initiate the full account transfer request via the ACAT system.
- Understand you must provide the Corporate Resolution in addition to the appropriate signature(s) if applicable.
- Certify, if trustee, you have the power and authority under the trust agreement and applicable law to enter into all transactions sales, and redemptions of mutual funds, and deliver any documents necessary to open and maintain accounts on behalf of the trust.

Print Account Owner Name <i>First, M.I., Last</i>	
Account Owner Signature	Date <i>MM - DD - YYYY</i>
SIGN ▶	▶