

# Fidelity Investments

## Change of Address/Name Change or Provide Date of Birth

**Instructions:** To update your address, name, and/or to provide us with your date of birth, please complete this form.

**For address changes:** A confirmation of your address change will be sent to your old and new addresses. To ensure the security of your account, your account will be frozen from loan and withdrawal activity for 15 calendar days. To waive this 15-day freeze, you are required to complete the signature guarantee on the second page of this form. Please notify us should you not receive the current address confirmation.

**To change your name:** Please provide a copy of a marriage certificate, divorce decree, court document granting a name change, or passport; or, complete the signature guarantee with your former and new name, on the second page of this form.

**Date of birth:** We must have your date of birth on file for you to establish a personal identification number (PIN) or request a withdrawal from your account.

### 1. YOUR INFORMATION

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

What information are you changing? (check all that apply):

Name       Address       Name and Address       Date of Birth

Please fill in all information below and include updated information where applicable.

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

First Name:  M.I.:

Last Name:

Former First Name:\*

Former Last Name:\*

Mailing Address:  Apt.#:

Address Line 2:

City:  State:

Zip: -

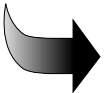
Daytime Phone: -- Evening Phone: --

\*For a name change, please provide both your new and former names.

Your Signature:  X      Date: --

A **signature guarantee** is required if you are changing your address and would like to waive the 15-day freeze. Please see the back of this form for the signature guarantee information.

Please read the other side of this form!



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## 2. YOUR SIGNATURE

A **signature guarantee** is required if you are changing your address and would like to waive the 15-day freeze. A signature guarantee can be obtained at a bank or other financial institution. You can also use a signature guarantee to change your name as a substitute to the documentation listed on page 1. Notaries public cannot provide a signature guarantee, as their authority does not extend to documents, such as this, for which federal securities law applies

**NOTE: A NOTARY PUBLIC CANNOT PROVIDE A SIGNATURE GUARANTEE.**

If the guarantee stamp to the right is not a medallion signature, print the name and telephone number of the person issuing the guarantee:

*Place signature guarantee stamp in box.*

If you are obtaining the signature guarantee for a name change, please provide your former and new name here.

Former Name:

New Name:

If you are submitting additional documents, please check here and list below:

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Return this form to: **Fidelity Investments, P.O. Box 770002, Cincinnati, OH 45277-0090**  
If you wish to overnight this form, return it to: **Fidelity Investments, 100 Crosby Parkway, KC1E, Covington, KY 41015**  
If you have any questions, please contact one of our Retirement Services Specialists at 1-800-343-0860, Monday through Friday, from 8:00 A.M. to midnight ET.

