



# Bank Wire Authorization

Use this form to establish standing bank wire instructions on your Fidelity account(s), including eligible retirement and nonretirement accounts. Do NOT use this form to request a specific transaction. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

## Helpful to Know

- Bank wire can be used to make urgent transfers FROM Fidelity to your account or someone else's account at a bank or financial institution.
- Bank wire will become available immediately after the feature is established on your account(s).
- Any transaction in your Fidelity IRA initiated with the instructions you create will result in a distribution from your Fidelity IRA and will be reported to the IRS. Note that:
  - Such distribution will generally result in taxable income to you for the year distributed to you, unless it is rolled over to another IRA or qualified employer plan within 60 days. It is your responsibility to ensure that the subsequent account is qualified to accept rollover amounts.
- Do not use bank wire to purchase an investment directly with another institution outside Fidelity.
- **A Medallion signature guarantee is required.**
- Bank wire is not available for:
  - Self-Employed 401(k)
  - Workplace Self-Directed Brokerage
  - Fidelity Retirement Plan (Keogh)
  - Investment-Only Retirement Account (Non-Prototype)
  - Health Savings Account (HSA)
- Online Transaction Limits:
  - Minimum Daily Limit: \$100
  - Maximum Daily Limit: \$100,000
- The Bank may charge a fee for receiving wires.

## 1. Account Owners

Name
Additional Owner/Authorized Individual Name

## 2. Fidelity Account(s)

Provide your Fidelity account number(s) for establishing bank wire:

Be sure each account listed is eligible for bank wire.

Fidelity Account Number

Fidelity Account Number

Fidelity Account Number

Form continues on next page. ►►



### 3. Bank Wire Standing Instructions *Use to transfer money FROM Fidelity to your account or someone else's account at a bank, credit union, or other financial institution.*

Provide bank account information to set up the bank wire feature. The bank or financial institution may charge additional fees for receiving bank wires.

All bank wire requests **MUST** have a Medallion signature guarantee. A notary seal/stamp is **NOT** a Medallion signature guarantee.

**FULL address is required for international wires.**

#### Wire Recipient

Bank Routing/ABA Number		Bank Name	
Account Number		Account Owner Name(s) <i>Required</i>	
Address of Wire Recipient			
City	State/Province	ZIP/Postal Code	Country
For Further Credit			
Additional Details (if applicable) <i>Instructions to be included with the wire transfer.</i>			

If the bank uses a correspondent bank, provide the information here. ▶

Correspondent bank information may not be required for all wires.

Indicate if the recipient bank is outside the United States. ▶

#### Correspondent (Intermediary)

Correspondent Bank Routing/ABA Number	Correspondent Bank Name
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Account is OUTSIDE the United States:

SWIFT Code	Name of Country
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### 4. W-8-Certified Customers *Explanation for standing instructions requested for a country different from the country of tax residence.*

If you are requesting standing instructions to send money to a financial institution in the United States or in a country different from the treaty country listed on your W-8, provide the reason below.

Required to be completed if applicable. ▶

Reason <i>250 characters maximum</i>
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### 5. Signature and Date *Form cannot be processed without signature and date.*

In the section below, "Fidelity," "us," and "we" refer to Fidelity Brokerage Services LLC and National Financial Services LLC and their affiliates, and their employees, agents, representatives, shareholders, successors, and assigns as the context may require; "you" and "account owner" refer to the owner indicated on the account form; and for any account with more than one owner (such as a joint or trust account), "you" and "account owner" or "account owners" refer to all owners, collectively and individually.

By signing below, you:

- Authorize Fidelity to act on all instructions given in this form.
- Accept all terms and conditions described in this form.
- Certify that all information provided in this form is true, accurate, and complete.
- Agree, if you are a trustee, a custodian, or the fiduciary of an employer-sponsored retirement plan, that you are responsible for complying with your legal and fiduciary obligations.
- Authorize us, upon receiving instructions from you or as otherwise authorized by you, to make payments from you by credit entries to the account at the

financial institution indicated in the form (Bank). You authorize the Bank to process such entries and to credit the account at that Bank for such entries. You ratify such instructions and agree that neither we nor any mutual fund will be liable for any loss, liability, cost, or expense for acting upon all such instructions believed to be genuine if we employ reasonable procedures to prevent unauthorized transactions. You agree that this authorization may only be revoked by written notice to us in such time and manner as to afford us and the Bank a reasonable opportunity to act upon it.

- Acknowledge that Fidelity will not be liable for any loss, expense, or cost arising out of your instructions, provided that it institutes reasonable procedures to prevent unauthorized transactions.
- If the account is owned by a business or entity, certify that you are authorized to enter into these transactions on behalf of the organization.

Signature and Date continues on next page. ▶▶



5. Signature and Date, continued

One authorized signature is required unless you have a Mutual Fund Account (the account number begins with a 2 followed by two letters), in which case all owners must sign.

A Medallion signature guarantee is required to establish bank wire instructions.

If the form is completed at a Fidelity Investor Center, the Medallion signature guarantee is not required. You can get a Medallion signature guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a Medallion signature guarantee.

PRINT OWNER/AUTHORIZED INDIVIDUAL NAME	
SIGN	OWNER/AUTHORIZED INDIVIDUAL SIGNATURE
	X
DATE	DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

PRINT OWNER/AUTHORIZED INDIVIDUAL NAME	
SIGN	OWNER/AUTHORIZED INDIVIDUAL SIGNATURE
	X
DATE	DATE MM/DD/YYYY
	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

**Did you sign the form and attach any necessary documents?**

Send the ENTIRE form and any attachments to Fidelity Investments. You will receive a "Revised Account Profile" confirming your updates.

**Questions?** Go to [Fidelity.com/transfermoneyshares](https://www.fidelity.com/transfermoneyshares) or call 800-343-3548.

**Regular mail**

Fidelity Investments  
PO Box 770001  
Cincinnati, OH 45277-0002

**Overnight mail**

Fidelity Investments  
100 Crosby Parkway KC1K  
Covington, KY 41015

On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates. Brokerage services are provided by Fidelity Brokerage Services LLC, Member NYSE, SIPC. 732215.8.0 (12/23)