

Fidelity Investments

Change of Address/Name Change or Provide Date of Birth

Instructions: To update your address, phone number, name, and/or 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 address. Please notify us should you not receive the current address confirmation. To ensure the security of your account, **your account will be frozen from loan and withdrawal activity for fifteen calendar days.** To waive this fifteen-day freeze, a signature guarantee is required.

To change your name: Please provide a copy of a legal document such as a marriage certificate, divorce decree, or court authorized name change. We will also accept this form with a signature guarantee of your new name. Legal documentation is not required if a signature guarantee is provided.

For date of birth updates: 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.

Return this form to:

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

Overnight Address:

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.

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:

Address Line 2:

City: State:

Zip:

Daytime Phone: -- Evening Phone: --

Name of Employer Sponsoring the Plan:

Plan Number (if known):



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2. YOUR SIGNATURE

Your Signature:

Date:

A **Signature guarantee** is required if:

- You are changing your name and are unable to provide supporting documentation (see previous page for further details).
- You are changing your address and would like to waive the fifteen-day freeze.

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

Place signature guarantee stamp in box.

Note: A notary public cannot provide a signature guarantee.

