# Fidelity Investments 403(b) Beneficiary Designation

## 1. GENERAL INSTRUCTIONS

This form is for plans that DO NOT require spousal consent for a beneficiary designation.

Please complete this form and sign it on the back. In the future, you may revoke the beneficiary designation and designate a different beneficiary by submitting a new Beneficiary Designation Form to Fidelity.

Mailing instructions:

Return this form in the enclosed postage-paid envelope or to

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

If you wish to send your form via overnight service, please send it to

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

**Questions?** Call Fidelity Investments at **1-800-343-0860**, Monday through Friday, from 8:00 A.M. to midnight ET, or visit us at www.fidelity.com/atwork.

## 2. DESIGNATING YOUR BENEFICIARY(IES)

You are not limited to two primary and two contingent beneficiaries. To assign additional beneficiaries, or to make a more complex beneficiary designation, please attach, sign, and date a separate piece of paper.

When designating primary and contingent beneficiaries, please use whole percentages and be sure that the percentages for each group of beneficiaries total 100%. Your primary beneficiary cannot be your contingent beneficiary. If you designate a trust as a beneficiary, please include the date the trust was created, and the trustee's name.

Unless otherwise specified by your plan, if more than one person is named and no percentages are indicated, payment will be made in equal shares to your primary beneficiary(ies) who survives you. If a percentage is indicated and a primary beneficiary(ies) does not survive you, the percentage of that beneficiary's designated share shall be divided among the surviving primary beneficiary(ies) in proportion to the percentage selected for them.

### 3. AUTHORIZATION

Please provide your signature.

Fidelity Investments Institutional Operations Company, Inc.



5VFITSRPE001L

## **Fidelity Investments** 403(b) Beneficiary Designation 1. YOUR INFORMATION

| Please use a <b>black</b> pen and print clearly in <b>CAPITAL LE</b>  | TTERS.  |  |  |  |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|--|--|--|
| Social Security #:  | Date of Birth:  |  |  |  |  |  |  |  |  |  |
| First Name:   |   |  |  |  |  |  |  |  |  |  |
| Last Name:  |   |  |  |  |  |  |  |  |  |  |
| Mailing Address:  |   |  |  |  |  |  |  |  |  |  |
| Address Line 2:   |   |  |  |  |  |  |  |  |  |  |
| City:   | State:  |  |  |  |  |  |  |  |  |  |
| Zip:  |   |  |  |  |  |  |  |  |  |  |
| Daytime Phone:  | Evening Phone:  |  |  |  |  |  |  |  |  |  |
| Name of Employer:   | Plan Number<br>(if known):  |  |  |  |  |  |  |  |  |  |
| I am: Single OR Married Nam   | ne of Site/Division:  |  |  |  |  |  |  |  |  |  |
| 2. DESIGNATII   | NG YOUR BENEFICIARY(IES)  |  |  |  |  |  |  |  |  |  |
| Please check here if you have more than two primary or contingent beneficiaries.                                |   |  |  |  |  |  |  |  |  |  |
| <b>Primary Beneficiary(ies)</b> I hereby designate the person(s) named below as primary the plan upon my death. | y beneficiary(ies) to receive payment of the value of my account(s) under |  |  |  |  |  |  |  |  |  |
| 1. Individual or Trust Name:  | Percentage: %   |  |  |  |  |  |  |  |  |  |
| Social Security #:  | Trust ID #:   |  |  |  |  |  |  |  |  |  |
| Date of Birth or Trust Date:  | Relationship to Applicant:  |  |  |  |  |  |  |  |  |  |
|   | Spouse OR Trust OR Other  |  |  |  |  |  |  |  |  |  |
| 2. Individual or Trust Name:  | Percentage: %   |  |  |  |  |  |  |  |  |  |
| Social Security #:  | Trust ID #:   |  |  |  |  |  |  |  |  |  |
| Date of Birth or Trust Date:  |   |  |  |  |  |  |  |  |  |  |
|   | Relationship to Applicant:  |  |  |  |  |  |  |  |  |  |

## 2. DESIGNATING YOUR BENEFICIARY(IES) (CONTINUED)

## **Contingent Beneficiary(ies)**

If there is no primary beneficiary living at the time of my death, I hereby specify that the value of my account is to be distributed to my contingent beneficiary(ies) listed below. Please note: Your primary beneficiary cannot be your contingent beneficiary.

| 1. | Individual or Trust Name:   |   |                             |   |                                      | Percentage:  |            |                  | %                    |
|----|---|---|-----------------------------|---|--------------------------------------|--|------------|------------------|----------------------|
|    | Social Security #:  |   | Trus                        | t ID#:  |                                      |  |            |                  |                      |
|    | Date of Birth or Trust Date:  | Relationship  | to Ap                       | plicant:  |                                      |  |            |                  |                      |
|    |   | Spouse  | OR                          | Trust   | OR                                   | Other  |            |                  |                      |
| 2. | Individual or Trust Name:   |   |                             |   |                                      | Percentage:  |            |                  | %                    |
|    | Social Security #:  |   | Trus                        | t ID#:  |                                      |  |            |                  |                      |
|    | Date of Birth or Trust Date:  | Relationship  | to Ap                       | plicant:  |                                      |  |            |                  |                      |
|    |   | Spouse  | OR                          | Trust   | OR                                   | Other  | Total =    | = 100%           | %                    |
| Pa | syment to contingent beneficiary(ies) will be made accor  | rding to the r  | ules o                      | f succession  | descr                                | ibed in the instruc  | ctions.    |                  |                      |
|    | 3. SIGNATU  | RE AND  | AUTI                        | HORIZAT   | ΠΟΙ                                  | 1  |            |                  |                      |
| •  | dividual Authorization: By executing this form  I certify under penalties of perjury that my Social Secut I am aware that the beneficiary information included in effect until I deliver another completed and signed Bene I am aware that the beneficiary information provided he for which Fidelity Management Trust Company (FMTC) Accounts or trust agreement in effect between FMTC an all previous designation(s) I have made on any of my Ac | this form be<br>eficiary Desig<br>rein shall app<br>(or its affiliat<br>d my Employ | comes<br>nation<br>bly to a | effective where Form to Fideling I or any succession. | nen de<br>delity<br>ty Acc<br>cessor | elivered to Fidelity<br>with a later date.<br>ounts under the pl<br>appointed pursua | lan listed | l in Se<br>terms | ction 1<br>s of such |
| Y  | our Signature:  |   |                             | Dat   | e:                                   |  |            |                  |                      |



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