

IRA Transfer Form



Please use this form to authorize the Fidelity Advisor Traditional IRA, Rollover IRA, Roth IRA, SIMPLE IRA, SEP IRA, or SARSEP IRA Custodian (or its agent) to initiate a transfer of your existing IRA directly from another IRA custodian and to invest the transferred assets in a Fidelity Advisor IRA. Contact your financial advisor for assistance completing this form.

This form cannot be used:

- to directly roll over a distribution from an employer-sponsored retirement plan into a Fidelity Advisor Rollover IRA. Please contact your plan administrator for the appropriate distribution forms. Some plans may allow you to use the Fidelity Advisor IRA Direct Rollover Form.
- if you are converting an IRA to a Roth IRA. Please use the Fidelity Advisor IRA Roth Conversion Form.
- if you are transferring a Beneficiary Distribution Account (BDA). Please use the Fidelity Advisor IRA BDA Application/Transfer Form.

Complete, sign and return this form and a Fidelity Advisor IRA Application (if applicable) to your financial advisor who will return it:

via **regular mail:**

Fidelity Investments Institutional Operations Company, Inc. (FIIOC),
P.O. Box 770002, Cincinnati, OH 45277-0086

via **overnight delivery:**

Fidelity Investments Institutional Operations Company, Inc. (FIIOC),
100 Crosby Parkway, KC1G, Covington, KY 41015

1 Account Information

Name (First, Middle Initial, Last)

Social Security Number

 - -

Date of Birth (mm-dd-yyyy)

 - -

2 Financial Advisor Information

Please have your financial advisor complete this section.

Firm Name

Representative Name (First, Middle Initial, Last)

Telephone Number

 - -

E-Mail Address

3 Where to Invest Your IRA Transfer Amount

Please check only **ONE** of the following choices.

A. I am opening a new Fidelity Advisor Traditional IRA, Roth IRA, Rollover IRA, SIMPLE IRA, or SEP/SARSEP IRA and have attached the appropriate application that contains the investment instructions.

OR

B. Invest proceeds in my existing Fidelity Advisor IRA, Roth IRA, Rollover IRA, SIMPLE IRA, or SEP/SARSEP IRA (a separate IRA Transfer Form should be used for each type of IRA you are transferring) as follows:

Fund Name and Share Class	Account Number Receiving Transfer	Whole Percentage*
1. <input type="text"/>	<input type="text"/>	<input type="text"/> %
2. <input type="text"/>	<input type="text"/>	<input type="text"/> %
3. <input type="text"/>	<input type="text"/>	<input type="text"/> %
4. <input type="text"/>	<input type="text"/>	<input type="text"/> %

Current employer Fidelity Advisor SIMPLE IRA Plan Number (if applicable)

Class A, B, C, and T shares are offered through a prospectus only. It is your responsibility to read the prospectus(es) for the fund(s) in which you invest.

* Total should equal 100%. If the percentages selected equal less or more than 100%, then the percentage of the first fund selected will be increased or decreased, to the extent necessary to bring the total to 100%. If you do not indicate a share class, Class T shares will be purchased.

4 Information About the IRA You Wish to Transfer

Type of IRA to be transferred:

- Traditional IRA Roth IRA Rollover IRA
 SEP IRA* SARSEP IRA** SIMPLE IRA***

Approximate Amount to be Transferred
\$, .

Date Contributions Were First Made to SIMPLE IRA (if applicable)

- -

How is it currently invested?

Mutual Fund Name(s)

All Mutual Fund(s)

CD Date of Maturity (mm-dd-yyyy)

CD† - -

Other (please specify)

Where is your IRA currently located? All information must be completed in full.

Name of Transferor Trustee or Custodian

Phone Number of Transferor Trustee or Custodian

- -

Overnight Delivery Address of Transferor Trustee or Custodian

Suite

City

State

ZIP Code

-

Name of Individual or Department Responsible for Transfers

Account Number

Please attach a copy of the most recent statement of the IRA you are transferring.

- * You should notify your employer of your SEP IRA transfer. In order to transfer your SEP IRA to Fidelity, the SEP IRA must be based upon IRS Form 5305-SEP. Please request from your financial advisor a separate Fidelity Advisor SEP/SARSEP IRA Application if you are establishing a new SEP IRA.
- ** You should notify your employer of your SARSEP transfer. In order to transfer your SARSEP to Fidelity, the SARSEP must be based upon IRS Form 5305A-SEP. Please request from your financial advisor a separate Fidelity Advisor SEP/SARSEP IRA Application if you are establishing a new SEP/SARSEP IRA under a previously established SARSEP Plan. New SARSEP plans can no longer be established.
- *** Assets in a SIMPLE IRA can be transferred to a Traditional IRA after completion of a two-year period which begins on the first day in which contributions are deposited into the SIMPLE IRA.
- † Please send us this IRA Transfer Form at least two weeks prior to the maturity date of your CD (but no more than four weeks prior to maturity).

5 Transfer Authorization

If I fail to designate whether all or part of my IRA is to be transferred to my Fidelity Advisor Traditional IRA, Roth IRA, Rollover IRA, SIMPLE IRA, or SEP/SARSEP IRA, you are hereby authorized to transfer all of such IRA to my Fidelity Advisor Traditional IRA, Roth IRA, Rollover IRA, SIMPLE IRA, or SEP/SARSEP IRA. If I fail to designate whether the proceeds are to be transferred immediately or at maturity, if applicable, you are hereby authorized to transfer such proceeds at maturity in the case of a CD, and immediately in all other cases.

To Transferor Trustee or Custodian:

Please be advised that Fidelity Advisor Funds® are non-ACAT eligible.

A. Please liquidate all or part (\$ _____) of the IRA referenced in Section 4 and transfer the proceeds to my Fidelity Advisor Traditional IRA, Roth IRA, Rollover IRA, SIMPLE IRA, or SEP/SARSEP IRA immediately or at maturity (for CD's only).

OR

B. Please accept this as your authority to transfer-in-kind* all **OR** part shares (_____) of the IRA referenced in Section 4.
part percentage (_____)

* This option is available only if your IRA or SIMPLE IRA is currently invested in Fidelity Advisor Funds, which clear through National Financial Services, LLC or National Securities Clearing Corporation. Only investments that are permitted under the terms of the applicable Custodial Agreement may be transferred-in-kind. A transfer-in-kind authorizes your Advisor Fund shares to be re-registered from your current IRA custodian to your IRA with Fidelity Management Trust Company.

6 Signature Section

- Although Fidelity Management Trust Company (FMTC), Custodian of my IRA, is (and its successor custodian may be) a bank, I recognize that neither Fidelity Distributors Corporation nor any mutual fund in which this IRA may be invested is a bank and that mutual fund shares are NOT (i) deposits or obligations of, or guaranteed by, any depository institution, or (ii) insured by the FDIC, the Federal Reserve Board or any other agency, and ARE subject to investment risks, including possible loss of principal amount invested.
- I hereby understand and agree that, to the extent applicable, if I do not indicate a share class of a mutual fund in which my IRA may be invested, my IRA will be invested in Class T shares of the mutual fund(s) I have selected.
- I have received and read the prospectus(es) for the fund(s) in which I am making my investment. If I am over age 70½, I attest that none of the amounts to be transferred will include any required minimum distributions for the current year pursuant to Section 401(a)(9) of the Internal Revenue Code. I understand that if I have elected a partial transfer of my IRA assets, I will forfeit the right to recharacterize any IRA contributions made prior to the transfer. I hereby agree to indemnify the custodian (its agents, affiliates, successors, and employees) of my IRA from any and all liability in the event I fail to meet any of the IRS requirements.
- I understand it is my responsibility to track the 5-year aging period for my Roth IRA as required by the IRS.

Note: Your mutual fund shares that are the subject of this transfer will be redeemed at the net asset value next determined after your transfer request is reviewed and determined to be in good order. If your transfer request is processed electronically via the NSCC system, your mutual fund shares will be redeemed at the net asset value determined after all conditions are satisfied in accordance with the procedures established pursuant to the applicable electronic system.

Your Signature

Date

 - -

Signature Guarantee Stamp

An important note regarding signature guarantees:

Your current Trustee or Custodian may require you to provide additional information and may also require your signature to be guaranteed. **Please contact them for requirements prior to completing this form.** A signature guarantee may be executed by any "eligible guarantor." Eligible guarantors generally include, but are not limited to, Commercial Banks, Trust Companies, Savings Associations and Credit Unions as defined by the Federal Deposit Insurance Act. Also included are member firms of a domestic stock exchange.

A Notary Public cannot provide a Signature Guarantee.

This Letter of Acceptance will be completed by the transfer agent on behalf of the new IRA or SIMPLE IRA Custodian.

Instructions for delivery to a Fidelity Advisor IRA, Roth IRA, Rollover IRA, SEP/SARSEP or SIMPLE IRA: Fidelity Management Trust Company (FMTC) and/or any successor custodian appointed pursuant to the terms of the Fidelity Advisor IRA, Roth IRA or SIMPLE IRA Custodial Agreement, as applicable, will accept the transfer described herein.

Please transfer on a trustee-to-trustee basis all or part of the designated IRA as instructed in Section 5. If such proceeds are to be transferred via check, please make the check payable to Fidelity Management Trust Company. Please indicate "Transfer" and include the following information on the check:

Account Number

FBO

Please mail to

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0086

Fidelity Authorized Signature

Date

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Fidelity Investments & Pyramid Design and Fidelity Advisor Funds are registered service marks of FMR Corp.