

# SIMPLE IRA Contribution Allocation and Exchange Form



**Please Note:** Please use this form if you wish to establish or revise the manner in which your Fidelity Advisor SIMPLE IRA contributions or your current account balances are invested. You may also use this form to change your address of record. Please contact your Financial Advisor for assistance in completing this form.

**When completing this form, please type or print clearly in all CAPITAL LETTERS using black ink.**

Please complete, sign and return this form to your Financial Advisor who will return it to the address below or you may fax this form to 888-321-7349.

Please mail this completed form via **regular mail** to:

Fidelity Investments Institutional Operations Company, Inc. (FIIOC),  
P.O. Box 770002, Cincinnati, OH 45277-0082

You can also mail this completed form via **overnight delivery** to:

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

## 1 Account Information

Owner's Name (First, Middle Initial, Last)

☐ Jr. Social Security Number (required)

☐ Sr. --

SIMPLE IRA Number

Date of Birth (mm-dd-yyyy)

--

Daytime Telephone Number

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## 2 Contribution Allocation – SIMPLE IRA Accounts Only

Use this section to change the way your future Elective Deferrals (if any) and Employer Matching or Employer Nonelective Contributions are invested. Contributions can be made in no more than ten fund choices. **Percentages must be whole numbers and the total must 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%.**

	Fund #	Fund Name	Percentage
<b>FUND 1</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 2</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 3</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 4</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 5</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 6</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 7</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 8</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 9</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>FUND 10</b>	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>TOTAL</b>			<input type="text"/> %

## 3

Use this section to re-allocate your existing balances by exchanging monies from one fund to another fund. Exchanges will be made into the same class of shares of an identically registered Fidelity Advisor Fund. A Contingent Deferred Sales Charge (CDSC) will not apply to class B shares exchanged. Please indicate whole dollars or shares. If you wish to exchange among more than five funds, please attach a separate sheet with additional allocation instructions.

## EXCHANGE 1

"From" Fund #	"From" Fund Name	"To" Fund #	"To" Fund Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount	Number of Shares	Percentage	
\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	

## EXCHANGE 2

"From" Fund #	"From" Fund Name	"To" Fund #	"To" Fund Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount	Number of Shares	Percentage	
\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	

### EXCHANGE 3

"From" Fund #	"From" Fund Name	"To" Fund #	"To" Fund Name
<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 300px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 300px; height: 30px; border: 1px solid #ccc;" type="text"/>
Amount	Number of Shares	Percentage	
\$ <input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	
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### EXCHANGE 4

"From" Fund #	"From" Fund Name	"To" Fund #	"To" Fund Name
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Amount	Number of Shares	Percentage	
\$ <input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 30px; border: 1px solid #ccc;" type="text"/>	
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## EXCHANGE 5

"From" Fund #	"From" Fund Name	"To" Fund #	"To" Fund Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount	Number of Shares	Percentage	
\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	

## 4

Please check to make sure you have completed all appropriate sections of this form, then sign and date below.

- ☒ I have received and read the prospectus(es) for the fund(s) into which I am making my contribution(s), and I understand that it is my responsibility to read the prospectus(es) for any mutual fund(s) into which I exchange.
- ☒ I authorize and request Fidelity Investments Institutional Operations Company, Inc. (FIIOC), as agent for Fidelity Management Trust Company (FMTC) (or their agents, affiliates, or successor custodians, as applicable), to make the above changes I have indicated. I hereby direct Fidelity Management Trust Company (FMTC) (or its successor(s)), Custodian of the Fidelity Advisor SIMPLE IRA, to establish a new fund position, as applicable, and to process contribution(s) and investment transaction(s), as set forth above, for the Fidelity Advisor SIMPLE IRA identified above. I understand that my Fidelity Advisor SIMPLE IRA will be invested in the class of shares that I previously selected on the Fidelity Advisor SIMPLE IRA Application.

Please Print Shareholder Name Below

Signature of Shareholder

Date \_\_\_\_\_

The trademarks and service marks appearing herein are the property of FMR Corp.