

Distribution — Automatic Payments

Use this form to set up automatic distributions from your 401(a), 401(k), 403(b) or 457(b) governmental employer plan. Fill in by hand using CAPITAL letters and black ink, or on screen (if electronic file). If you need more room for information or signatures, use a copy of the relevant page.

Helpful To Know

- You can only take a distribution if you meet one of the criteria for eligibility (see Section 3).
- Workplace retirement plan distributions may have tax consequences. You may want to consult a tax or financial professional.
- To set up automatic distributions for more than one retirement plan, use a separate form for each plan.
- To get your plan number(s), call your plan sponsor or go to fidelity.com/atwork.
- To validate your profile, go to netbenefits.com/profile. To change your address, call your plan sponsor or go to netbenefits.com/profile.
- For most other types of distributions (such as hardship or rollover) find the appropriate forms at fidelity.com/atwork.
- Non-resident aliens must provide IRS form W-8BEN and a U.S. taxpayer ID number to claim any tax treaty benefits.

1. Account Owner/Participant

Name		Social Security or Taxpayer ID Number	
Date of Birth MM - DD - YYYY		Evening Phone	Daytime Phone
Email			

☐ Not married ☐ Married Your spouse may need to sign this form. Ask your employer or Fidelity.

Address If the address we have for you is correct, skip to Section 2.

Providing a new address may delay your check unless you get a signature guarantee (see Section 9).

Address			
City	State/Province	Zip/Postal Code	Country

2. Plan Involved

Check one. To get your plan number, go to netbenefits.com/profile or call the employer sponsoring your plan.

Plan Type and Number

<input type="checkbox"/> 401(a)	<input type="checkbox"/> 403(b)	Plan Number
<input type="checkbox"/> 401(k)	<input type="checkbox"/> 457(b)	

Name of Employer Sponsoring Plan

3. Reason for Distribution Required by federal tax law and your plan.

Check ONLY one. Contact the employer sponsoring your plan to confirm which reasons your plan accepts and whether you qualify.

Former Employees

☐ Separation from service You no longer work for the employer sponsoring the plan.

Current Employees

- ☐ Qualified by age Age requirement varies by plan type. You must be at least 59½ (for 457(b), 70½).
- ☐ Other Must be specified in your plan.

4. Payment Calculation Method Your available plan assets may be less than your plan value. Tax withholding may apply.

Choose one method, and provide any required information.

By Payment Amount

- ☐ Distribute proportionally from all available plan assets:

Payment Amount
\$

By Number of Payments

- ☐ Distribute the following number of payments proportionally from all available plan assets:

Payments

5. Frequency of Payments Payments will continue until available plan assets are depleted or you tell us in writing to stop them.

- ☐ Once a year ☐ Once a month
☐ Every 3 months ☐ Twice a month

Date of FIRST Payment	MM	-	DD	-	YYYY

6. Tax Withholding

The IRS requires us to apply withholding on any taxable distribution (including any distribution that is eligible for rollover, but is not rolled over). Each state sets its own withholding rates and requirements on taxable distributions. We apply these rates unless you, or state law, direct otherwise.

Note that the amount of tax withheld will be calculated on, and subtracted from, the amount of your distribution. Amounts withheld may be less or more than what you actually owe in taxes. The withholding instructions you provide here will remain in effect for this account until you give us new instructions. To review the Special Tax Notice for details, go to fidelity.com/atwork.

For U.S. Persons, if your payments will be finished within 10 years, the minimum federal mandatory withholding rate of 20% will apply. If your payments will continue for 10 years or longer, federal withholding will be based on tax tables unless you indicate otherwise. If Fidelity does not have your specific information, the withholding will be that for a married person with 3 dependents.

For non-resident aliens, the minimum federal mandatory withholding rate of 30% will apply, unless the prevailing tax treaty rate applies because you have a valid IRS Form W-8BEN on file with Fidelity.

You can indicate a higher withholding rate if you choose, but if you indicate no rate, or a rate below an applicable federal minimum, by law we must withhold the applicable minimum. If you are under age 59½, a 10% early distribution tax penalty may apply.

Federal

- ☐ Withhold federal taxes at the rate of:

Percentage
.0%

Note that if there is federal withholding, certain states require that there also be state withholding.

- ☐ Do NOT withhold federal taxes NOT available if your payments will be finished within 10 years.

State

- ☐ Withhold state taxes at the applicable rate

- ☐ Do NOT withhold state taxes unless required by law

Account's legal/
residential address
determines which
state's tax rules apply.

7. Delivery Method

First payment transaction timings start from when your distribution request is approved, and are estimates, not guarantees.

Choose ONLY one
delivery method and
provide any required
information.

Electronic Funds Transfer (EFT) At least one owner's name must be exactly the same on both accounts.

- ☐ EFT is already set up on account Allow 3 business days. Skip to Section 8.

- ☐ Set up EFT to bank or credit union account:

Allow 18-21 business days (includes verification, set-up and transaction processing).

- ☐ Checking Provide account information or attach voided check. ☐ Savings Provide deposit slip.

Bank Routing Number Nine digit number starting with 0, 1, 2, 3, or 4.	Bank Name
Bank Account Number	Bank Account Owner(s) Name(s)

Ask your bank for the
routing number. ►

Check

- ☐ Check sent to mailing address Default if no choice indicated. Allow 7 business days.

Deposit Allow 3 business days.

- ☐ Deposit into Fidelity non-retirement account:

Account Number

8. Spouse's Consent *Complete if you are married and if required by your plan.*

The spouse's signature **MUST** either be notarized or be witnessed by a plan representative. A signature guarantee is **NOT** a notary seal.
By signing below, you:

- Voluntarily consent to the distribution(s) indicated on this form, knowing that your spouse's request is not valid without your consent.
- Acknowledge that you may be giving up your right to receive assets that would otherwise go to you upon your spouse's death.
- Acknowledge that your spouse's waiver of a qualified joint and survivor annuity, if applicable, is not valid without your consent.
- Agree that if the distribution described in this form is not processed within 180 days of the date you sign this form, your consent expires.
- Acknowledge that you cannot take back your consent unless your spouse allows you to, and files a new form with Fidelity.

Print Spouse Name	
Spouse Signature	Date MM - DD - YYYY
SIGN ▶	▶

Notarization or Plan Representative Witness

(Notary only.) State of _____, in the County of _____, subscribed and sworn to before me by the above-named individual who is personally known to me or who has produced _____ as identification, that the foregoing statements were true and accurate and made of his/her own free act and deed, on ____/____/____.

Print Notary / Plan Representative Name	
Notary / Plan Representative Signature	Date MM - DD - YYYY
SIGN ▶	▶

▼ NOTARY SEAL / STAMP ▼

(Notary only.) My commission ends on ____/____/____.

9. Signature and Date *Account owner/participant must sign and date.*

If the retirement plan requires a signature from the plan sponsor in Section 10, you do not need a signature guarantee. If the retirement plan does **NOT** require a plan sponsor signature, you will need a signature guarantee if either of two cases applies:

- Your distribution is more than \$10,000 and is not going to a Fidelity account, you are providing a new address, **AND** it's important that your transaction not be delayed by 15 days.
- Your initial distribution is more than \$100,000.

A Medallion signature guarantee must guarantee at least the amount of your distribution. A notary seal is **NOT** a signature guarantee.

By signing below, you:

- Authorize Fidelity to act on all instructions given on this form.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is correct to the best of your knowledge.
- Acknowledge that you have received the Special Tax Notice and, if applicable, the Forms of Benefit Notice and the Notice of the Waiver of the Qualified Joint and Survivor Annuity.

Medallion Level For Fidelity Use Only

Print Participant Name	
Date MM - DD - YYYY	
DATE ▶	
Participant Signature	
SIGN ▶	

▼ SIGNATURE GUARANTEE ▼

☐ The signature guarantee above is **NOT** a Medallion signature guarantee:

Financial Institution Representative Name	Phone	Extension

10. Plan Sponsor Approval

Consult the employer sponsoring your plan or Fidelity to determine whether plan sponsor approval is required. You may need plan sponsor approval even if you no longer work for the sponsor.

Participant's Date of Hire MM - DD - YYYY	Separation Date If applicable MM - DD - YYYY	Employer-Source Vesting
		%

By signing below, you:

- Acknowledge that the distribution as requested on this form is permitted by the employer's plan.
- Certify that you are on record with Fidelity as being authorized to sign on behalf of the plan sponsor.

Print Plan Representative Name	
Plan Representative Signature	Date MM - DD - YYYY
SIGN ▶	▶

Did you print and sign the form, and attach any necessary documents? Did ALL required individuals sign? Send the form and any necessary documents to Fidelity.

Faxing 1-877-330-2476 (ONLY if your request doesn't require spousal consent, a notary stamp, or a signature guarantee).

Questions? Go to fidelity.com/atwork or call 1-800-343-0860 (TTY, 1-800-259-9743), business days (except NYSE holidays) from 8 AM to midnight (ET).

Unless otherwise directed, deliver to:

Regular mail

Fidelity Investments
PO Box 770002
Cincinnati, OH 45277-0090

Overnight mail

Fidelity Investments
100 Crosby Parkway KC1E
Covington, KY 41015

On this form, "Fidelity" means Fidelity Investments Institutional Operations Company, Inc.