



Account Number



Journal Request

Use this form to transfer cash and/or securities between accounts held at Fidelity. You can also request that the instruction be saved as a standing instruction for future use. This form can be used by the Account Owner or Authorized agent/Advisor that has been previously granted the required level of asset movement authority by the account owner (herein "you"). **Do not use this form for delivery of shares to an account outside of Fidelity.**

Do NOT use this form for Retirement distributions. Retirement contributions require the Account Owner's signature unless covered by asset movement authority. Journal requests must be received by 4:00 p.m. ET for same-day processing. You should confirm if assets being journaled are eligible for transfer, as certain assets may not be eligible for transfer and may be liquidated. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Authorized agent/Advisor/Family Office

Firm Name	G Number
	G

1. Account Owner(s)

First Name	M.I.	Last Name
Additional Owner, Company or Trust Name <i>if applicable</i>		
Social Security/Taxpayer ID Number	Required	
X X X X X	<input type="checkbox"/> SSN <input type="checkbox"/> TIN	

2. Reason for Journal

Journals to or within a Nonretirement account

- Nonretirement to Nonretirement account
- Cash to Margin *Skip to Section 4.*
- Margin to Cash *Skip to Section 4.*

Journals to a Retirement account

- Retirement account to Retirement account with the same owner. **Note:** This does not include conversions to Roth IRAs or rollovers between retirement plans and IRAs.
- IRA Contribution

IRA Contribution Year

Annual IRA contributions into Traditional/SEP, Rollover and Roth IRAs will be coded as current year unless specified. Prior year contributions are not permitted after the tax filing deadline. Do not select for SEP Employer contributions.
- Rollover *Includes 60-day rollover and a direct rollover from a Non-Fidelity prototype employer-sponsored plan.*
- SEP IRA Employer Contribution
- Fidelity Retirement Plan Employer Contribution (Keogh Profit Sharing or Money Purchase)

Self Employed 401(k) Plans Only

- Fidelity Retirement Plan Employee Contribution Current Year
- Fidelity Retirement Plan Employee Contribution Prior Year

All annual contributions, other than rollovers, must be made in Cash.



3. Receiving Account Information

Required.
Provide name(s) on receiving account.

Owner Name(s), Company or Trust Name	Account Number
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Optional. Check one.
If we determine that the account is not First or Third party, we will process the request under designation we have determined is appropriate.

First Party Third Party
 Use Standing Instructions already on file.
 Establish new Standing Instructions *Requires account owner signature*

4. Transfer Instructions *All annual contributions, other than rollovers, must be made in Cash.*

All Cash and Securities

Transfer Entire Account, Cash and Securities

Optional. Close my Account

Cash

Check one. Specified Amount

Amount	
\$.

Entire Core Balance

Securities

Check one. Transfer ALL Securities

Transfer the following Securities:

Enter one of the following values into the Choose Specific Disposal Method Override field(s) as applicable below.

- FIFO:** First in, First out
- HICO:** High cost in, First out
- HICL:** High cost in, First out, Long-term
- HICS:** High cost in, First out, Short-term
- INFI:** Intraday First in, First out
- LIFO:** Last in, First out
- LOCL:** Low cost in, Long-term
- LOCO:** Low cost in, First out
- LOCS:** Low cost in, Short-term

Indicate the number of shares or check "All."

Enter specific share identification, if applicable. The client must provide the lot acquisition date for specific share instruction on or before the date of the transfer (gift/journal) taking place. For multiple lots, list each lot on a separate line.

To list more securities, include the information on the next page. **Important:** The attachment must be signed and dated.

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		<input type="checkbox"/> All
Provide Lot information		Choose Specific Disposal Method
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method
\$.	<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to
		OR
		<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		<input type="checkbox"/> All
Provide Lot information		Choose Specific Disposal Method
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method
\$.	<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to
		OR
		<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		<input type="checkbox"/> All
Provide Lot information		Choose Specific Disposal Method
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method
\$.	<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to
		OR
		<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		<input type="checkbox"/> All
Provide Lot information		Choose Specific Disposal Method
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method
\$.	<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to
		OR
		<input type="checkbox"/> Default to Account Level <input type="checkbox"/> Override to

Transaction Type

Check one. Gift Non-Gift

5. Signature and Date *Form cannot be processed without signature and date.*

By signing below, you and/or your Authorized agent/Advisor/Family Office:

- Authorize Fidelity Brokerage Services LLC ("FBS") and National Financial Services LLC ("NFS"), together "Fidelity," to move cash or securities to you or the third party named above based on the instructions in this form.
- I understand and agree that if I am requesting a journal that includes shares that are not eligible to be transferred in kind, these shares may be liquidated. I am responsible for confirming whether the shares to be transferred prior to giving these instructions, and understanding any tax or other impact of shares that are liquidated.

- Agree to indemnify and hold harmless Fidelity, its affiliates and their respective officers, directors, employees and agents from and against any and all losses, costs, claims or financial obligations (including reasonable attorneys' fees) that may arise from any act or omission of your Authorized agent/Advisor/Family Office with respect to your account.

Authorized agent/Advisor

- Represent that you are an authorized person of the above-named Advisor Firm, and that you are acting pursuant to the level of Asset Movement Authorization granted by the Account Owner(s) as defined in the applicable Brokerage Account Client Agreement and/or Asset Movement Authorization form.

Either an Account Owner or Authorized agent/Advisor must print name, sign and date. Third-party requests require Account Owner's signature unless standing instructions and Asset Movement Authorization are already on file. Note: A retirement contribution from a registration other than an Individual or Transfer on Death (TODI) is considered a third party.

Print Account Owner Name <i>First, M.I., Last</i>	
Account Owner Signature	Date <i>MM - DD - YYYY</i>
SIGN ▶	▶

Print Authorized agent/Advisor Name <i>First, M.I., Last</i>	
Authorized agent/Advisor Signature	Date <i>MM - DD - YYYY</i>
SIGN ▶	▶



From Account Number

To Account Number

Additional Securities for Journal Request

Use this form to list additional securities for your journal request. This form must contain the same signature as the attached form.

Enter one of the following values into the Choose Specific Disposal Method Override field(s) as applicable below.

FIFO: First in, First out
HICO: High cost in, First out
HICL: High cost in, First out, Long-term
HICS: High cost in, First out, Short-term
INFI: Intraday First in, First out

LIFO: Last in, First out
LOCL: Low cost in, Long-term
LOCO: Low cost in, First out
LOCS: Low cost in, Short-term

Indicate the number of shares or check "All."

Enter specific share identification, if applicable. The client must provide the lot acquisition date for specific share instruction on or before the date of the transfer (gift/journal) taking place. For multiple lots, list each lot on a separate line.

Investment Name	CUSIP or Symbol	Number of Shares/ALL	<input type="checkbox"/> All
Provide Lot information		Choose Specific Disposal Method	
Lot Acquisition Date MM DD YYYY	Lot Acquisition Cost	Disposal Method	Override to
	\$.	<input type="checkbox"/> Default to Account Level	<input type="checkbox"/>
OR			

Print Account Owner Name First, M.I., Last	
Account Owner Signature	Date MM - DD - YYYY
SIGN	

Print Authorized agent/Advisor Name First, M.I., Last	
Authorized agent/Advisor Signature	Date MM - DD - YYYY
SIGN	