Print Reset

Fidelity Advisor

Freeze Removal Request

Use this form to request either the permanent or temporary removal of a freeze from your Fidelity Advisor account(s).
Type on screen or fill in using CAPITAL letters and black ink.

Helpful to Know

- **A signature guarantee is required. A notary public cannot provide a signature guarantee.**
- For joint accounts, all account owners must sign, and each signature must be signature-guaranteed.
- The original, completed form must be **returned by mail**.
- For additional account numbers, attach a letter of instruction.
- For additional account owners/trustees, attach a signature guaranteed letter of instruction.
- New account requests must be accompanied by the appropriate New Account Application.
- Requests for redemptions, exchanges, or transfers must be accompanied by the appropriate supporting form.

1. Account Information

Owner/Trustee/Custodian First Name	M.I.	Owner/Trustee/Custodian Last Name

SSN or TIN *(required)*	Date of Birth *MM DD YYYY*

You must provide a unique email address and mobile phone number for each account owner to be used to verify and/or authorize transactions.

Mobile Phone Number *Used as your primary phone*	Email Address*

Joint Owner/Trustee First Name	M.I.	Joint Owner/Trustee Last Name

SSN or TIN *(required)*	Date of Birth *MM DD YYYY*

Mobile Phone Number *Used as your primary phone*	Email Address*

Only accounts listed will be included in freeze removal.

Account Number	Account Number	Account Number

** See Electronic Delivery section for more details.*

2. Electronic Delivery

IMPORTANT: By signing this form, you are consenting to receive all account-related communications electronically. You agree that Fidelity may use your email and/or mobile number to message, call, or text you for this purpose. Message and data rates apply; frequency may vary. To manage your delivery preferences, log into *accounts.fidelity.com* and select the eDelivery settings in your Overview section.

To confirm your consent, please respond to the electronic message which Fidelity will email to you.

Note:

- Your delivery preferences are applied across all eligible Fidelity accounts owned by you based upon your most recent election. If you have already consented to electronic delivery, your election will not change.
- The email address provided should not be your Authorized agent/ Representative's email address.
- This email address will replace any existing email address already on our system.

3. Freeze Removal Options

General Freeze Removal

☐ Fully remove the freeze from my account(s) listed in Section 1.

Money Movement

☐ Temporarily lift the freeze on my account(s) listed in section 1 to allow processing of a monetary request. Note, if a monetary transaction is needed, include the appropriate form. Once the transaction is complete, the freeze will be re-added to my account(s).

New Account Establishment

☐ Establish a new account(s) using the attached new account application and transfer the assets from my account(s) listed in section 1 to the newly established account(s).

Check one. ▶

☐ Add freeze to my newly established account

☐ Do not add freeze to my newly established account.

Address Update

☐ Update the address on my account(s) listed in Section 1 to the address listed below. The freeze will remain in place unless I have indicated otherwise below.

☐ Remove freeze from my account(s) listed in Section 1.

Mailing Address

For P.O. Box mailing addresses, complete U.S. Residential Address section.

Street Address		Apartment
City	**State**	**Zip/Postal Code**

U.S. Residential Address ☐ Check if same as above.

Street Address		Apartment
City	**State**	**Zip/Postal Code**

☐ Update the address on all of my accounts to the address(es) listed above.

4. Signatures and Dates *Form cannot be processed without signatures, dates, and **signature guarantee**.*

Complete all appropriate sections of this form, then sign and date below.

By signing below, you:

- Confirm that you are authorized to act on the referenced account.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is true, accurate and complete.
- Understand that Fidelity reserves the right, but not the obligation, to confirm your instructions with you prior to acting on the instructions.
- Agree to indemnify and hold Fidelity harmless from any and all losses, costs, claims, or financial obligations that may arise from any act or omission of you with respect to your account and from any and all losses, costs, claims, or financial obligations that may arise from acting upon the instructions provided herein.
- Agree, if you are a trustee or a custodian, that you are responsible for complying with your legal and fiduciary obligations.

For Business Accounts, if you are the sole officer, you:

- State that you are authorized to enter into these transactions on behalf of the organization.
- State that you are the sole officer of, and the sole individual authorized to act on behalf of, the registered owner.

Print Owner/Trustee/Custodian Name *First, M.I., Last*

Owner/Trustee/Custodian Signature Date *MM - DD - YYYY*

SIGN

SIGNATURE GUARANTEE STAMP

Print Joint Owner/Trustee Name *First, M.I., Last*

Joint Owner/Trustee Signature Date *MM - DD - YYYY*

SIGN

SIGNATURE GUARANTEE STAMP

An important note regarding signature guarantees:

Your signature must be guaranteed.

Fidelity will accept a signature guarantee from any Eligible Guarantor Institution as defined under Rule 17Ad-15(a)(2) of the Securities Exchange Act of 1934 — including banks, credit unions (if authorized under state law), savings associations, broker/dealers, securities exchanges or association, or clearing agency.

Please note that a notary public cannot provide a signature guarantee, nor will Fidelity accept a notary stamp or seal as substitute for a valid signature guarantee.

IMPORTANT: An original signature guarantee is required. This form must be mailed.

Mail To: Fidelity Investments Institutional Operations Company LLC (FIIOC)

Regular: P.O. Box 770002,
Cincinnati, OH 45277-0082

Overnight: 100 Crosby Parkway, KC1G
Covington, KY 41015

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

Questions? For help completing this form, call 800-522-7297 (Financial Representatives) or 877-208-0098 (Shareholders).

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