



Fidelity Advisor

# Durable Power of Attorney Affidavit and Indemnification

Use this form to certify to Fidelity the validity and effectiveness of a non-Fidelity Durable Power of Attorney for your Fidelity Advisor account.

Type on screen or fill in using CAPITAL letters and black ink.

## Helpful to Know

- A Power of Attorney (POA) is not permitted on certain registration types, including trust accounts, business, custodial, estate, conservator, escrow, Keogh plans, investment-only retirement accounts, and other fiduciary registrations. It also cannot be used for the Fidelity Advisor 401(k) Program or other similar employer-sponsored qualified plan programs for which Fidelity Management Trust Company ("FMTC") serves as directed trustee.
- **An original of this form must be completed for each Attorney-in-Fact added to your account.**
- For retirement accounts, your Financial Representative cannot be the Attorney-in-Fact designated in Section 2.
- If the Attorney-in-Fact who signs this form is a successor/contingent Attorney-in-Fact, evidence must accompany the request that shows the primary Attorney-in-Fact is unable or unwilling to act.
- **The original or a copy of the valid, signed, original non-Fidelity Durable POA documentation, and any supporting documents required, must be attached to this form. The POA must:**
  - Specifically identify the names of the grantor and the Attorney-in-Fact.
  - Include the date the POA becomes effective, the signature of the Account Owner (Principal), and durability language, e.g., "This power of attorney shall not be affected by my subsequent disability." or "Incapacity of the principal or this power of attorney shall not be affected by my subsequent disability or incapacity."
  - Grant full trading authority or the power to buy, sell, exchange, or transfer securities.
  - Contain no conditions, restrictions, or exclusions on trading authority, and contain no material limitations that would impact a Fidelity Account, such as effective or expiration dates, or specific securities.
- If the POA's effectiveness is contingent upon the incapacitation of the Account Owner (i.e., springing), proper evidence of incapacity pursuant to the POA document must be attached.
- If the Attorney-in-Fact is requesting a beneficiary change on the account, the POA document must explicitly include that power.
- If multiple Attorneys-in-Fact are listed in the POA document, that document must state that the agents may act independently or severally. (Anything other than "independently" will not be accepted.)

## 1. Account Owner

Account numbers  
to which to add  
Power of Attorney:

First Name	M.I.	Last Name	SSN
Mobile Phone Number			
Fidelity Advisor Account Number	Additional Fidelity Advisor Account Number	Additional Fidelity Advisor Account Number	

## 2. Attorney-in-Fact Designation

The individual being designated in this section must have his or her signature notarized in Section 3. The following information must be completed to designate an Attorney-in-Fact on the account identified in Section 1.

Attorney-in-Fact First Name	M.I.	Attorney-in-Fact Last Name
Attorney-in-Fact SSN	Attorney-in-Fact Date of Birth MM DD YYYY	Mobile Phone Number

### 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

## 3. Affidavit and Indemnification by Attorney-in-Fact *Named Attorney-in-Fact must sign and date this form in the presence of a Notary Public.*

I, the above-named Attorney-in-Fact, being duly sworn, depose and state that the attached Power of Attorney is in full force and effect, and to the best of my knowledge, I affirm and state that:

1. I am the Attorney-in-Fact named in the power of attorney executed on \_\_\_\_\_ (Date) by \_\_\_\_\_ ("Account Owner"); and
2. The Account Owner is not deceased, and has not partially or completely revoked, terminated, or suspended this Power of Attorney; and
3. A petition to determine the incapacity of, or to appoint a guardian for, the Account Owner is not pending; and
4. In the event that more than one Attorney-in-Fact is named in the attached Power of Attorney, I represent that I am authorized to act severally and that Fidelity (as defined below) may follow any of my instructions independent of all other Attorneys-in-Fact, including the delivery of assets to me personally; and
5. I understand that in the event of conflicting instructions given by Attorneys-in-Fact or an Account Owner and an Attorney-in-Fact, Fidelity may restrict the account until joint written instructions are received to its satisfaction; and
6. I understand that Fidelity may, in its discretion, restrict my ability to take distributions or withdrawals from the account after the presentation of the Power of Attorney document; and
7. I agree not to exercise any powers granted to me by this Power of Attorney if I know or have reason to know that it has been partially or completely revoked, terminated, or suspended or is no longer valid due to any reason whatsoever; including without limitation, separation or divorce (including, in some cases, annulment) from the Account Owner, death of the Account Owner or revocation by operation of law; and
8. I agree not to give, transmit, convey, or issue any instructions concerning the above-referenced account(s) that I know or believe are not authorized by or otherwise not in compliance with, or in violation of, the attached Power of Attorney; and
9. For the purpose of inducing Fidelity to act upon my instructions, I do fully indemnify and hold harmless Fidelity Investments Institutional Operations Company LLC, Fidelity Management Trust Company, and their affiliates, control persons, officers, directors, successors, assigns, and employees ("Fidelity") from and against any and all losses, liabilities, claims, and costs (including reasonable attorneys' fees) resulting from transactions made in accordance with my instructions; and
10. The attached Power of Attorney will remain in full force and effect until such time as written notification of termination or significant alteration is received by Fidelity at: Fidelity Investments Institutional Operations Company LLC (FIIOC), P.O. Box 770002, Cincinnati, OH 45277-0082.

I agree to be bound by all terms and conditions set forth in any agreements related to the Account Owner's Fidelity account(s), including the applicable prospectus and/or Fidelity Advisor IRA Custodial Agreement and Disclosure Statement. This affidavit and the attached Power of Attorney shall be governed by Massachusetts law to the extent not superseded by federal law.

I understand the investment objectives and trading plans of the Account Owner and will design my trading strategies to meet those objectives. I represent that I have received and read copies of the terms and conditions concerning this account from the Account Owner and agree to be bound by such terms and conditions as are currently in effect and amended from time to time.

Signed under the pains and penalties of perjury. All future documents received by Fidelity signed by the Attorney-in-Fact must be signed indicating capacity.

### 3. Affidavit and Indemnification by Attorney-in-Fact

*Named Attorney-in-Fact must sign and date this form in the presence of a Notary Public. continued*

#### Statement of Notary Public

*In this section, "You" and "you" refer to the Notary Public.*

You certify that the individual signing above appeared before you on the date indicated below, that they are known to you to be the individuals they claim to be, and that they represented to you that they made the certifications above their signature of their own free will.

**Important Note:** CA Notaries are permitted to submit a separate page notary document. If used, it must identify the document being notarized.

**Notice to CA Residents:** A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

Print Attorney-in-Fact Name <i>First, M.I., Last</i>		<b>NOTARIZATION 1</b>	
Attorney-in-Fact Signature		State	County
Date MM - DD - YYYY		Identification	
SIGN		Print Notary Name	
		Commission Expires MM - DD - YYYY	
Notary Signature		Date MM - DD - YYYY	
SIGN			
NOTARY STAMP OR SEAL			

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

#### UPLOAD THROUGH WEB

##### Log into Accounts.Fidelity.com

##### Instructions for Shareholders:

- Under "Manage Accounts, Other Services," go to the "Upload Documents" link.
- Follow instructions on the web portal and click "UPLOAD DOCUMENTS."

##### Instructions for Financial Representatives:

- Under "Quick Links" on the landing page, go to the "Upload Documents" link.
- Follow instructions on the web portal and click "UPLOAD DOCUMENTS."

**IMPORTANT:** If an original signature guarantee or notary is required, this form must be mailed.

#### FAX

##### Please Do Not Fax.

Original document needed via upload (preferred) or mail.

#### MAIL

##### Fidelity Investments Institutional Operations Company LLC (FIIOC)

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

**Overnight:** 100 Crosby Parkway, KC1G, Covington, KY 41015

**Questions?** For help completing this form, call 800-522-7297 (Financial Representatives) or 877-208-0098 (Shareholders), or visit [accounts.fidelity.com](http://accounts.fidelity.com).

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Fidelity Investments Institutional Operations Company LLC  
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