



Account Document Household

Use this form to instruct Fidelity Brokerage Services LLC and National Financial Services LLC (collectively, "Fidelity") to consolidate account documents into a single envelope or account statement. Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page or a blank sheet.

Helpful To Know

- For an account with multiple owners to be eligible for house-holding, ALL account owners/trustees must sign this form.
- If any account owner/trustee changes an address on any account on a household statement, it will automatically update the mailing address on ALL other accounts.
- Account documents included in the household include monthly account statements, eligible daily and quarterly trade confirmations, revised account profiles and other eligible account documents as Fidelity makes them available.

- Charitable Gift Fund (CGF) accounts are not eligible.
- Non-prototype accounts for the same plan are eligible if all accounts have the same address and trustees and do not have self-directed brokerage. Non-prototype accounts cannot be househanded with other registration type accounts.

Important

- Accounts with multiple owners are eligible for householding only if all owners sign this form. All owners of all accounts in a household will be able to view the householded statement that contains all accounts. i.e., if a trust has two trustees 1 and 2, and trustee 1's individual account is househanded with the trust account, trustee 2 would be able to view the individual account on the householded statement.

Household Eligibility

- Fidelity prototype 401(k), 403(b), 457 accounts are not eligible.

Authorized agent/Advisor

| | |
|-----------|----------|
| Firm Name | G number |
| | G |

1. Account Owner(s)

As future accounts are opened, a new Account Document Household form must be completed to include the accounts in an existing household or to create a new household.

ALL owners must be listed. Include co-owners, trustees, and custodians.

| First Name | M.I. | Last Name | Social Security Number |
|------------|------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

2. Household Address *Required.*

Provide the address to where you want the combined documents sent. This address will serve as the mailing address for all the accounts combined under this household.

This address will be effective for all accounts combined in this household and will override any previous addresses.

| | | | |
|---|----------------|-----------------|---------|
| Name on Consolidated Statement <i>For example, "The Smith Family"</i> | | | |
| Address | | | |
| City | State/Province | Zip/Postal Code | Country |
| | | | |





3. Fidelity Accounts to Include

List any account you would like to include in this household.

| | | |
|----------------|----------------|----------------|
| Account Number | Account Number | Account Number |
| Account Number | Account Number | Account Number |
| Account Number | Account Number | Account Number |
| Account Number | Account Number | Account Number |

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

By signing this form, you:

- Authorize Fidelity Brokerage Services LLC and National Financial Services LLC (collectively "Fidelity") to consolidate the account documents by account type and

mail the combined mailing for accounts listed on this form into a single envelope. The combined documents combined mailing will be mailed to the mailing address indicated above.

- Understand and agree that the combined documents combined mailing will be viewable on the Fidelity.com web site by any account owner/trustee with access to the web site.

ALL Account Owners must print name, sign, and date.

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

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

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

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

Authorized agent/Advisor Signature and Date

By signing this form, you:

- Represent that you are an authorized person of the above-named Advisor and that such Advisor is acting under grant of the proper Authorization by the account owner(s)/trustee(s) as defined in the Brokerage Account Agreement. Fidelity

is further authorized to accept and act upon the instructions provided by the Authorized agent/Advisor. Fidelity will accept the Advisor's signature for single party household requests only. For multiple party requests, all account owner/trustees' signatures are required.

- Indemnify and hold harmless FBS and its officers, directors, employees, agents and affiliates from and against any and all losses, claims or financial obligations that may arise from any act or omission of your Authorized agent/Advisor with respect to your account(s).

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

