Print Reset

Account Number

Journal Request

Use this form to transfer cash and/or securities between your accounts held at Fidelity. 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. 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 *if applicable*

Phone number will be used to contact you if there is a question about this request.

Daytime Phone	Extension

☐ **Use this number to update the daytime phone number on this account.**

Social Security Number

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

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

☐ 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

3. Receiving Account Information

Required.

Provide name(s) on receiving account.

Owner Name(s), Company or Trust Name	Account Number

☐ Use Standing Instructions already on file.

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:

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
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	

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.
- 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 *First, M.I., Last*	Print Authorized agent/Advisor Name *First, M.I., Last*

SIGN Account Owner Signature	Date *MM - DD - YYYY*	SIGN Authorized agent/Advisor Signature	Date *MM - DD - YYYY*

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.

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
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	**Lot Acquisition Cost**	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	
Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. ☐ All
Lot Acquisition Date *MM DD YYYY*	Lot Acquisition Cost	
	$.	

Print Account Owner Name *First, M.I., Last*	Print Authorized agent/Advisor Name *First, M.I., Last*

Account Owner Signature	Date *MM - DD - YYYY*	Authorized agent/Advisor Signature	Date *MM - DD - YYYY*
SIGN		SIGN	

Print Reset