



Premiere Select® Roth IRA Conversion

Use this form to request a conversion of all or any part of your Premiere Select Traditional IRA, Rollover IRA, SEP-IRA or Fidelity SIMPLE IRA ("IRA") to a Premiere Select Roth IRA with the same Authorized agent/Advisor. The receiving Roth IRA must already be established or this form needs to accompany a new account application. This form can be used by an IRA owner or an Authorized agent/Advisor that has been granted asset movement authority (herein "you" or "your").

Read the attached Customer Instructions, Terms and Conditions before completing this form. 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. If using a blank sheet, include the account numbers, your signature and the date.

Authorized agent/Advisor

Firm Name	G Number
	G

1. Account Information

Phone number will be used to contact you if there is a question about this request.	First Name	M.I.	Last Name
	Daytime Phone	Extension	<input type="checkbox"/> Use this number to update the daytime phone number on this account.
	Social Security/Taxpayer ID Number		

IRA being converted	To	Premiere Select Roth IRA
Account Number		Account Number

2. Conversion Instructions

Convert your existing IRA to your Premiere Select Roth IRA indicated in Section 1 as specified below. Select either Full Conversion in-kind or indicate partial conversion instructions.

If the Authorized agent/Advisor initiates this conversion using ICP, the option to leave the account open is not available. See instructions. You must have sufficient cash in your core account investment vehicle. If a liquidating trade is necessary, consult your Authorized agent/Advisor.

Full Conversion in-kind Convert the entire balance of your IRA to your Roth IRA. Your IRA account will be closed unless you check the box to keep it open. (The conversion will be based on the existing positions in your IRA on the date of the conversion.)

Keep open your IRA being converted If you do not select this box, your existing IRA will be closed after your full conversion is completed.

Partial Conversion in cash Convert the following dollar amount from your IRA to your Roth IRA.

Amount
\$.

Partial Conversion in-kind Convert the following positions from your IRA to your Roth IRA.

Investment Name	CUSIP or Symbol	Number of Shares/ALL
		. <input type="checkbox"/> ALL
		. <input type="checkbox"/> ALL
		. <input type="checkbox"/> ALL
		. <input type="checkbox"/> ALL
		. <input type="checkbox"/> ALL

Optional. Additional instructions attached. To list more securities, attach a separate sheet and include the account numbers for the IRA being converted and the Roth IRA, and the names, CUSIPs and amounts for each security. You must sign and date the attached instructions.



3. Tax Withholding Elections

Complete this section only if the IRA owner is a U.S. person (including a U.S. resident alien). The tax withholding elections below will apply to this conversion only. Read the Notice of Withholding in the Customer Instructions, Terms and Conditions before completing this section.

Federal Income Tax Withholding

Check one.
If no election is made, federal income tax will be withheld from your conversion at a rate of 10%.

Do not withhold federal income tax from the IRA conversion.

Withhold federal income tax from the IRA conversion at the percentage rate of:

Percentage
.0%

If the percentage rate entered is less than 10%, the federal income tax at a rate of 10% will be withheld.

State Income Tax Withholding

Check one.
Do not make an election if you are a resident of AK, FL, HI, MS, NH, NV, SD, TN, TX, WA, or WY.
The state of residence in the legal address on this IRA will determine the state income tax withholding requirements for your conversion.

Do not withhold state income tax from the IRA conversion. For residents of CA, NC, and OR, this box must be checked if federal income taxes are being withheld and you do not want state income taxes withheld. For residents of DE and MI, this box must be checked regardless of whether or not federal income taxes are being withheld if you do not want state income taxes withheld.

Withhold state income tax from the IRA conversion in accordance with the minimum amount or percentage, if any, as determined by the requirements of your state of residence. If your state does not provide a minimum amount or percentage for withholding and a specific percentage was not provided in the section below, state income taxes will not be withheld from your conversion.

Withhold state income tax from the IRA conversion at the percentage rate of:

Percentage
.0%

If the percentage rate entered is less than your state's minimum withholding requirements, your state's minimum amount or percentage will be withheld.

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

By signing this form, you:
IRA Owner only

- Represent that you have received the Premiere Select Roth IRA Custodial Agreement and Disclosure Statement at the time you completed the IRA Application and agree to be bound by the terms and conditions thereof.
- Accept full responsibility for complying with all IRS rules on conversions.
- Understand that the taxable converted amount will be subject to federal income taxes in the year in which the conversion occurs.
- Attest that, if you are required to take a Required Minimum Distribution, you have done so for the current year pursuant to Section 401(a)(9) of the Internal Revenue Code with respect to your IRA, and you accept full responsibility for complying with these requirements.

- Certify under penalties of perjury, that you are a U.S. person (including a resident alien individual) and that the taxpayer identification number (or Social Security number) you provided with your IRA Application (or, as updated in a subsequent communication to Fidelity) is your correct U.S. taxpayer identification number, or that if you are not a U.S. person (including a U.S. resident alien), you have previously submitted IRS Form W-8BEN and included your U.S. taxpayer identification number (or Social Security number) in order to claim tax treaty benefits.

Authorized agent/Advisor only

- Represent that you are an authorized individual of the above-named Authorized agent/Advisor, and request that Fidelity make the above conversion from the IRA owner's IRA pursuant to the asset movement authorization granted by the IRA owner.

IRA Owner and Authorized agent/Advisor

- Have read, fully understand, and agree to comply with the Customer Instructions, Terms and Conditions, including the Notice of Withholding attached to this Premiere Select Roth IRA Conversion form.
- Authorize and request Fidelity Brokerage Services LLC ("FBS") and National Financial Services LLC ("NFS," together with FBS, "Fidelity") to make the above-requested distribution from the IRA and conversion contribution to the Roth IRA.
- Indemnify Fidelity Management Trust Company and Fidelity, and their agent(s), successors, affiliates, and employees, from any liability in connection with following the instructions in this form, including any liability in the event that you fail to meet the IRS requirements regarding conversions.

Either the IRA Owner or an Authorized agent/Advisor that has been granted asset movement authority must print name, sign, and date.

Print IRA Owner Name <i>First, M.I., Last</i>	
IRA 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 ▶	▶

Premiere Select® Roth IRA Conversion

Customer Instructions, Terms and Conditions

Instructions, Terms and Conditions for the IRA Owner

Read these Instructions, Terms and Conditions carefully before completing and signing the attached form. The IRA owner is responsible for complying with IRS rules governing IRA distributions and conversions to a Roth IRA, including required minimum distributions. If an IRA owner fails to meet any IRS requirements regulating IRA distributions, the IRA owner may be subject to tax penalties. If the IRA owner has any questions regarding the IRA owner's specific situation, consult with either a tax advisor or the IRA owner's Authorized agent/Advisor.

Instructions, Terms and Conditions for Authorized agent/Advisor

If the Authorized agent/Advisor is signing this form on behalf of the IRA owner, the signor represents he or she is an authorized individual of the above-named Authorized agent/Advisor and that he or she is acting pursuant to the asset movement authorization previously granted by the IRA owner.

Read these Instructions, Terms and Conditions carefully before completing and signing the attached form. The IRA owner is responsible for complying with IRS rules governing IRA distributions and conversions to a Roth IRA, including required minimum distributions. If the Authorized agent/Advisor fails to meet any IRS requirements in regard to requesting an IRA distribution, the IRA owner may be subject to tax penalties.

Form Instructions

The attached form should be used by the IRA owner or an Authorized agent/Advisor that has been granted asset movement authority (herein,

"you" or "your") to request a Roth conversion from a Premiere Select Traditional IRA, Rollover IRA, SEP-IRA, or Fidelity SIMPLE IRA ("IRA") held through Fidelity Brokerage Services LLC ("FBS") and National Financial Services LLC ("NFS," together with FBS, "Fidelity").

The taxable converted amount will be subject to federal income, and in some cases, state taxes in the year in which the conversion occurs.

If the IRA owner is required to take a required minimum distribution from the IRA, the IRA owner must do so prior to converting to a Roth IRA.

SIMPLE IRA assets may be converted to a Roth IRA only after the expiration of the two-year period beginning on the date the IRA owner's employer first made contributions to the IRA owner's SIMPLE IRA.

If you wish to convert the entire account in kind, the IRA account will be closed unless you choose to leave the account open by checking the box in Section 2. Note that the option to leave the account open is not available for conversions initiated in ICP (Integrated Cashiering Platform, Fidelity's transaction entry tool used by Authorized agent/Advisor).

If you wish to convert an IRA currently held with another Custodian to a Premiere Select Roth IRA, you must first transfer the IRA to the same type of IRA prior to requesting the conversion. You will need to complete a Transfer of Assets Form to initiate this transfer and only one Premiere Select IRA Application to establish both IRAs.

Note to Authorized agent/Advisor: Do not send this Conversion form to Fidelity until the transfer of assets is complete.

Notice of Withholding

Read carefully before completing the Tax Withholding Elections section of the form.

A conversion to a Roth IRA is subject to federal (and in some cases, state) income tax withholding unless you elect not to have withholding apply. If you withhold state and/or federal taxes from your Roth IRA Conversion, the amount withheld may be subject to the 10% early withdrawal penalty unless an exception applies. Withholding will apply to the gross amount of each conversion, even if the IRA owner has made non-deductible contributions. Moreover, failure to provide a U.S. residential address will result in 10% federal income tax withholding on the conversion proceeds even if you have elected not to have tax withheld (an IRS requirement as applicable). A Post Office Box does not qualify as a residential address.

If you elect to have withholding apply (by indicating so on the Roth conversion form, by making no choice, or by not providing a U.S. residential address), federal income tax will be withheld from the conversion at a rate of at least ten percent (10%). If federal income tax is withheld from the conversion amount, state income taxes may also be withheld regardless of the election. See below for IRA owner's state's withholding rules. The IRA owner's state of residence will determine his or her state income tax withholding requirements, if any. The IRA owner's state of residence is determined by his or her legal address of record provided for the IRA.

Residents of AR, IA, KS, MA, ME, OK, and VT: If federal income tax is withheld, state income tax of at least the IRA owner's state's minimum requirements must be withheld in addition to federal income tax withholding at the time of the conversion. If you elect out of federal income tax withholding, state income tax will not be withheld unless you indicate otherwise.

Residents of CA, NC, and OR: If federal income tax is withheld, state income tax of at least the IRA owner's state's minimum requirements must be withheld in addition to federal income tax withholding at the time of the conversion unless you elect not to have state income taxes withheld.

Residents of DE: State income tax of at least the IRA owner's state's minimum requirements must be withheld regardless of whether or not federal income tax is withheld unless you elect not to have state income taxes withheld.

Residents of MI: State income tax of at least your state's minimum requirements must be withheld regardless of whether or not federal

income tax is withheld. Tax withholding is not required if you meet certain MI requirements governing pension and retirement benefits. Reference the MI W-4P Form for additional information about calculating the amount to withhold from your distribution. Contact your tax advisor or Authorized agent/Advisor for additional information about MI requirements.

Residents of AK, FL, HI, MS, NH, NV, SD, TN, TX, WA, and WY: State income tax withholding is not available on Roth IRA conversions. Consult a tax advisor, state agency, or investment advisor for more information.

Residents of all other states and the District of Columbia: The IRA owner is not subject to mandatory state income tax withholding; however, you may elect voluntary state income tax withholding in a percentage. If you elect to have state income taxes withheld and the IRA owner's state provides a minimum amount or percentage for withholding, you must elect a percentage that is not less than the IRA owner's state's minimum withholding requirements. If the percentage you elect for withholding is less than the IRA owner's state's minimum withholding requirements, the IRA owner's state's minimum amount or percentage will be withheld.

Important: State tax withholding rules can change, and the rules cited above may not reflect the current ruling of the IRA owner's state. Consult with a tax or investment advisor to obtain the most up-to-date information pertaining to the IRA owner's state.

Whether or not you elect to have federal and, if applicable, state income tax withheld, the IRA owner is still responsible for the full payment of federal income tax, any state tax or local taxes, and any penalties which may apply to this conversion. Whether or not you elect to have withholding apply (by indicating so on the Roth conversion form), the IRA owner may be responsible for payment of estimated taxes. The IRA owner may incur penalties under the IRS and applicable state tax rules if the IRA owner's estimated tax payments are not sufficient.

If the IRA owner is not a U.S. person (including a U.S. resident alien), you must submit IRS Form W-8BEN, Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding, prior to submitting the Roth conversion form to claim tax treaty benefits, if applicable. A conversion will be subject to applicable non-treaty tax withholding rates if the IRA owner fails to provide your Authorized agent/Advisor Form W-8BEN. To obtain Form W-8BEN, consult a tax advisor or go to the IRS Web site at <http://www.irs.gov>.