

# IRA Money Line Instructions

Fidelity Money Line® allows you to transfer money electronically between your bank or credit union account and your Fidelity IRA. Your bank or credit union must be a member of the Automated Clearing House. Please allow 14 days for the Money Line feature to become active. Allow three business days from the date of request for funds to transfer. You must be named on the account at the financial institution receiving the assets. Please note: Fidelity does not charge a fee for this service; however, your bank may.

## 1 CUSTOMER INFORMATION

Name (first, middle initial, last)

Social Security Number

( ) -

Daytime Telephone Number

## 2 ACCOUNT INFORMATION

I would like to have a Money Line option for the following Fidelity IRAs:

Fund Name

Account #

Fund Name

Account #

OR

Brokerage IRA #    -

Brokerage IRA #    -

The maximum annual amount that you can contribute to all IRAs in total is the lesser of \$2,000 or 100% of compensation.

## 3 BANK INFORMATION

Simply attach a voided check from your bank account or provide the following information. You must be named on the account. Passbook savings accounts are **not** eligible.

Name of Your Bank

Your Bank's ABA/Routing Number (Contact your bank to obtain)

Your Name as it appears on your Bank Account

Your Bank Account Number

- ☐ Please apply these instructions to the Personal Withdrawal Services Plan I have established.
- ☐ This is a change to existing Money Line instructions on my account.

## 4 SIGNATURE

I hereby authorize and request the custodian(s) of my IRA(s), Fidelity Management Trust Company (FMTC), to make distributions or to secure payments of amounts to be invested according to the above instructions. If I have indicated herein that such payments are to be debited from or credited to my bank account, I authorize the bank or credit union named on the voided check provided ("Depository") to accept any such debit or credit entries initiated by FMTC and their agents, affiliates, or successor custodians, as applicable, in such account and to debit or credit the same to such account, without responsibility for the correctness thereof or for the existence of any further authorization relating hereto.

It is understood that this authorization may be terminated by me at any time by written notification to FMTC and their agents, affiliates, or successor custodians, as applicable, and to the Depository. Any such notification shall be effective only with respect to entries after receipt of such notification and a reasonable time to act on it.

I represent and warrant that: 1) I have personally printed the foregoing IRA Money Line Form, and 2) the terms of this Form have not been changed and are identical to the terms as originally set forth by Fidelity. I acknowledge that any alteration of the Form's original terms shall be null and void and I shall be bound by the terms of the original Form set forth by Fidelity. I also understand that FMTC or any of its agents, successors, or affiliates may not process this request in the event it has reasonable grounds to believe the foregoing is untrue.

SIGNATURE (required)

DATE

X

|   |                            |                  |
|---|----------------------------|------------------|
| John Doe<br>Sixty-One Maple St.<br>Anytown, MA 00000      | VOID                       | s. _____ Dollars |
| PAY TO THE ORDER OF                                       |                            |                  |
| First National Bank<br>One Main Street, Anytown, Ma 00000 | Bank Routing No. 010000010 |                  |

Attach check here.



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PO Box 770001, Cincinnati, OH 45277-0002  
Fidelity Brokerage Services, Inc. Member NYSE, SIPC.  
Fidelity Distributors Corporation

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