

# Transfer Shares as a Gift—Nonretirement

Use this form to transfer shares of stock, bonds, or publicly traded or other DTC-eligible securities to a non-Fidelity account as a gift. Only use this form to transfer mutual fund shares held within your brokerage account if the receiving firm is ACAT eligible. Do NOT use this form for retirement accounts or to transfer between Fidelity accounts. To allow adequate time for processing, Fidelity should receive this form at least two weeks prior to any deadline (e.g., year-end). Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

## 1. Fidelity Account Information

Provide name(s) on transferring account.

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

## 2. Gifting Instructions

Receiving Firm's Name		Receiving Firm's DTC Number
Receiving Firm's Address		
For the Benefit of		Receiving Firm's Account Number
Additional Details (if applicable) <i>Instructions to be included with the transfer.</i>		

Indicate the number of shares or check "ALL." **ONLY mutual fund positions can be transferred as partial share amounts, stocks MUST be transferred as whole shares.**

Enter specific Lot Acquisition Dates; otherwise, your default lot disposal method will be used.

Investment Name	CUSIP or Symbol <i>Required</i>	Number of Shares/ALL	<input type="checkbox"/> ALL
Lot Acquisition Date <i>MM DD YYYY</i>	Lot Acquisition Cost		
	\$		

Investment Name	CUSIP or Symbol <i>Required</i>	Number of Shares/ALL	<input type="checkbox"/> ALL
Lot Acquisition Date <i>MM DD YYYY</i>	Lot Acquisition Cost		
	\$		

Investment Name	CUSIP or Symbol <i>Required</i>	Number of Shares/ALL	<input type="checkbox"/> ALL
Lot Acquisition Date <i>MM DD YYYY</i>	Lot Acquisition Cost		
	\$		

Investment Name	CUSIP or Symbol <i>Required</i>	Number of Shares/ALL	<input type="checkbox"/> ALL
Lot Acquisition Date <i>MM DD YYYY</i>	Lot Acquisition Cost		
	\$		

To list more securities, make a copy of this page.

Form continues on next page. ►►

### 3. Signature and Date *Form cannot be processed without signature(s) and date(s).*

In this form, "Fidelity" refers to Fidelity Brokerage Services LLC and National Financial Services LLC, and their affiliates, employees, agents, representatives, shareholders, successors, and assigns as the context may require; and "You," "you," and "your" refer to all account holders.

By signing below, you:

- Warrant and represent that you are empowered and authorized to direct, and so direct, Fidelity to transfer the securities identified in Section 2 from your account identified in Section 1 to the recipient's account identified in Section 2.
- Agree to indemnify Fidelity (jointly and severally, for accounts with more than one owner) from, and hold Fidelity harmless for, any and all losses, liabilities, claims, and costs (including reasonable attorney's fees) resulting from acting upon such instructions.
- Accept that any assets not readily transferable might not be transferred within the time frames set by FINRA or other applicable authorities.
- Accept all terms and conditions described in this form.
- Accept that Fidelity is not responsible for changes in the value of assets that may occur during the transfer process.
- Affirm that you are aware of any tax or financial implications that may arise in connection with this gift prior to transfer, including penalties, fees, financial losses, or losses of product features or benefits.

**One authorized signature is required unless you have a Mutual Fund Account (the account number begins with a 2 followed by two letters) in which case all owners must sign.**

**A Medallion signature guarantee is required if the transfer is over \$17,000.**

*If the form is completed at a Fidelity Investor Center, the Medallion signature guarantee is not required. You can get a Medallion signature guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a Medallion signature guarantee.*

PRINT OWNER/AUTHORIZED INDIVIDUAL NAME	
SIGN	OWNER/AUTHORIZED INDIVIDUAL SIGNATURE
	X
TODAY'S DATE MM/DD/YYYY	
DATE	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

PRINT OWNER/AUTHORIZED INDIVIDUAL NAME	
SIGN	OWNER/AUTHORIZED INDIVIDUAL SIGNATURE
	X
TODAY'S DATE MM/DD/YYYY	
DATE	X

▼ MEDALLION SIGNATURE GUARANTEE ▼

**Did you sign the form?** Send the ENTIRE form and any attachments to Fidelity Investments.

**Questions?** Go to [Fidelity.com](http://Fidelity.com) or call 800-343-3548.

**Regular mail**  
 Fidelity Investments  
 Attn: TOA Deliveries  
 PO Box 770001  
 Cincinnati, OH 45277-0033

**Overnight mail**  
 Fidelity Investments  
 Attn: TOA Deliveries  
 100 Crosby Parkway KC1B  
 Covington, KY 41015-4325

*On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates. Brokerage services are provided by Fidelity Brokerage Services LLC, Member NYSE, SIPC. 717743.6.0 (10/23)*

