

Account Number

Premiere Select®

Standing Payment Instructions

Use this form to establish, change, or delete standing Bank Wire, Electronic Funds Transfer ("EFT"), Journal and/or Check Disbursement instructions on your Premiere Select Traditional, Roth, Rollover, SEP or SIMPLE IRA, IRA Beneficiary Distribution Account ("BDA"), Roth IRA BDA, Premiere Select Retirement Plan account, or Retirement Plan BDA, held through National Financial Services LLC ("NFS").

Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information, use a copy of the relevant page.

Helpful to Know

- Do NOT use this form for nonretirement accounts.
- Standing Instructions that are added to your account may be purged from the system due to inactivity after an extended period of time.
- If establishing 1st Party EFT instructions, a copy of a voided check, deposit slip or statement must be included with this form.
- If you are using standing Electronic Funds Transfer (EFT) instructions to pay your IRA Annual Maintenance Fee, the instructions must be from a 1st Party account.
- If you are using standing journal instructions to pay your IRA Annual Maintenance Fee, the account must be a nonretirement account from an account registered to you either individually or as a joint owner.
- **Note:** Contact your investment representative for information on how to request a distribution from your retirement account and/or how to establish IRA annual maintenance fee payment instructions, as applicable.

1. Account Owner

First Name	Middle Name	Last Name

2. Bank Standing Instructions

Bank Standing Instructions allow you to move money between your retirement account and a bank account via Bank Wire (processed via the Federal Reserve System), or EFT (processed via the Automated Clearing House, "ACH"). **Bank Wire:** Once Bank Wire standing instructions are established and approved, they are active immediately. Your Broker/Dealer and/or your bank may charge a fee for a Bank Wire. **EFT:** EFT may take 4–5 business days to become active. Business days are Monday through Friday. Bank and New York Stock Exchange holidays are not included. EFT receipts are available for 1st Party EFT only and are allowed into Premiere Select Traditional, Roth, Rollover and SEP-IRAs only. **If establishing 1st Party EFT, a voided check, deposit slip or statement must be included with this form.**

Bank Wire

- Check one. ▶
- Establish new instructions
- Change existing instructions
- Delete existing instructions

Line Number

If you have multiple instructions established and are changing or deleting an existing instruction, include the line number. Obtain the line number from your investment representative.

Obtain the correct routing number from the bank. Different routing numbers may be used for Bank Wires and EFT transactions.

Bank Routing Number	Bank Name
Bank Account Number <i>final destination</i>	Payee Name(s) Exactly as Shown on Bank Account

Payee Name(s) and Address is REQUIRED.

Payee Address		
City	State/Province	Zip/Postal Code

Use to provide an additional message to receiving bank.

Details

Use for wiring through an intermediary bank.

Further Credit Account Number	Further Credit Name

REQUIRED if the bank account is **OUTSIDE** the U.S.

SWIFT Code	Destination Country

2. Bank Standing Instructions *continued*

EFT Instructions #1

- Check one. ► Establish new instructions
 Change existing instructions
 Delete existing instructions

Line Number

If you have multiple instructions established and are changing or deleting an existing instruction, include the line number. Obtain the line number from your investment representative.

1st Party The IRA owner is an owner of the bank account.

- Use these instructions to pay the IRA Annual Maintenance Fee.
 Checking **OR** Savings

Obtain the correct routing number from the bank. Different routing numbers may be used for Bank Wires and EFT transactions.

Bank Routing Number	Bank Name
Bank Account Number <i>final destination</i>	Payee Name(s) Exactly as Shown on Bank Account

EFT Instructions #2

- Check one. ► Establish new instructions
 Change existing instructions
 Delete existing instructions

Line Number

If you have multiple instructions established and are changing or deleting an existing instruction, include the line number. Obtain the line number from your investment representative.

1st Party The IRA owner is an owner of the bank account.

- Use these instructions to pay the IRA Annual Maintenance Fee.
 Checking **OR** Savings

Obtain the correct routing number from the bank. Different routing numbers may be used for Bank Wires and EFT transactions.

Bank Routing Number	Bank Name
Bank Account Number <i>final destination</i>	Payee Name(s) Exactly as Shown on Bank Account

3. Journal Standing Instructions

Journal Standing Instructions allow you to transfer cash or securities from the retirement account number provided at the top of this form to another brokerage account ("to account") provided below.

Certain journals and transfers are not permissible from retirement accounts to other brokerage accounts or retirement accounts.

Consult with your investment representative for further information.

- Establish Instructions Provide the "to account" numbers that you wish to establish:
 Use these instructions to pay the IRA Annual Maintenance Fee Payment will be transferred from the first account listed below.

Account Number

Account Number

Account Number

Account Number

- Delete Instructions Provide the "to account" numbers that you wish to delete:

Account Number

Account Number

Account Number

Account Number

4. Check Disbursement Standing Instructions

Check Disbursement Standing Instructions allow you to request that a check be paid and mailed to the name and address on record or to an alternate payee and/or alternate address listed below.

Payee #1

- Check one. Establish new instructions
 Change existing instructions
 Delete existing instructions

Line Number

If you have multiple instructions established and are changing or deleting an existing instruction, include the line number. Obtain the line number from your investment representative.

- Check one. **1st Party** Paid and mailed to name and address on record.
(If selected, only the Memo and Check Stub Information fields can be modified.)
 3rd Party Paid and/or mailed to an alternate name(s) and/or address.

Avoid any account number or SSN that compromises a customer's identity. If needed, use the Memo and Check Stub Information fields.

Payee		
Attention <i>maximum 32 characters total including "Attn:"</i>	OR	Care of <i>maximum 32 characters total including "C/O"</i>
Attn:		C/O
Address		
City	State/Province	Zip/Postal Code
Memo <i>maximum 30 characters</i>		
Check Stub Information <i>maximum 100 characters</i>		

Information provided in the Memo field will print on the check but will not appear visible in the window of the envelope.

Payee #2

- Check one. Establish new instructions
 Change existing instructions
 Delete existing instructions

Line Number

If you have multiple instructions established and are changing or deleting an existing instruction, include the line number. Obtain the line number from your investment representative.

- Check one. **1st Party** Paid and mailed to name and address on record.
(If selected, only the Memo and Check Stub Information fields can be modified.)
 3rd Party Paid and/or mailed to an alternate name(s) and/or address.

Avoid any account number or SSN that compromises a customer's identity. If needed, use the Memo and Check Stub Information fields.

Payee		
Attention <i>maximum 32 characters total including "Attn:"</i>	OR	Care of <i>maximum 32 characters total including "C/O"</i>
Attn:		C/O
Address		
City	State/Province	Zip/Postal Code
Memo <i>maximum 30 characters</i>		
Check Stub Information <i>maximum 100 characters</i>		

Information provided in the Memo field will print on the check but will not appear visible in the window of the envelope.



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

By signing below, you:

- Authorize National Financial Services LLC ("NFS"), the agent of Fidelity Management Trust Company ("FMTC"), Custodian/Trustee, to utilize these payment instructions when you request a distribution(s) from your retirement account for payment to the designated payee, bank or other brokerage accounts above in accordance with the instructions given by you and/or your Broker/Dealer to NFS without first confirming those instructions with you directly.
- Understand and agree that NFS will not be liable for any loss, cost, or expense so long as NFS transmits the distribution proceeds to the bank account or payee identified above or transfers cash or securities to another brokerage account maintained at your Broker/Dealer identified above. NFS reserves the right, but has no obligation, to confirm your Broker/Dealer's instructions with you prior to acting on such instructions.
- Further certify and agree that the above directions and authorizations in this document will continue until your Broker/Dealer and, if required, NFS receive the actual written notice of any change thereof.
- Further agree to indemnify and hold harmless NFS, FMTC and their officers, directors, employees, agents, affiliates, shareholders, successors, assigns, and representatives from and against any and all losses, claims, or financial obligations that may arise from any act or omission by you and/or your Broker/Dealer with respect to your retirement account.
- Understand and agree that NFS cannot confirm the account registration at a receiving bank or financial institution.
- Understand that these instructions may be purged from your account if the instructions have not been used for an extended period of time.

Either the account owner or an authorized individual 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 ▶	▶