Account Number							

Premiere Select®

IRA/HSA Annual Maintenance Fee Payment Instructions

Use this form to establish, change, or revoke instructions for paying the annual maintenance fee for your Premiere Select Traditional, Roth, Rollover, SEP or SIMPLE IRA, IRA Beneficiary Distribution Account (BDA) or Roth IRA BDA, referred to as "IRA" or "account," or Health Savings Account ("HSA" or "account"), held through National Financial Services LLC (NFS). Use one form per IRA/HSA account.

Type on screen or fill in using CAPITAL letters and black ink.

Helpful to Know

- If you do not provide valid payment instructions, the annual fee will be deducted from your IRA/HSA's core account investment vehicle (core account).
- Payments made from your bank account via Electronic Funds Transfer (EFT) or Intra-Bank Payment (IBP), described below, must be from a 1st Party account, meaning the IRA/HSA owner is an owner of the bank account.
- If you are establishing 1st Party EFT instructions, a copy of a voided check, deposit slip or statement must be included with this form.
- Payments made via a journal transaction from your nonretirement account must be from an account registered to you either individually or as a joint owner.
- Standing instructions that are added to your account may be purged from the system due to inactivity after an extended period of time.

1. Account Owner

	First Name	Middle Na	me	Last Name			
	Address	· · · · · · · · · · · · · · · · · · ·					
	City				State	Zip/Postal Code	
	Type of Request for Paying	the Annual Main	tenance	Fee			
	☐ Establish new fee payme	nt instructions					
	☐ Change existing instructi		nformatio	n that is changing in	the appro	opriate section.	
Skip to Section 3. ▶							
2. Fee Payme	ent Instructions						
are not included. EFT rece		EFT only and are	allowedi	nto Premiere Śelect 🏾	Fradition	w York Stock Exchange holidays al, Roth, Rollover, SEP-IRAs and n.	
Check one and provide the requested information.	Journal Transfer cash from my no	onretirement accou		ount Number			
	☐ EFT The IRA/HSA owner	☐ EFT The IRA/HSA owner is an owner of the bank account.					
	Use existing EFT instructions						
	Line Number OR		(which y		ur investr	shed, provide the line number here ment representative) and provide count number below.	
	Establish new 1st Par	tv EFT instruction:	S				
Obtain the correct	Checking OR [Savings					
routing number from the bank. Different routing	<u> </u>						
numbers may be used							
for Bank Wires and EFT transactions.	Bank Account Number final de	stination Payee Na	ame(s) Exactl	y as Shown on Bank Accoun	t		

continued on next page

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2. Fee Payment Instructions continued

	Intra-Bank Payments (IBP) IBP is a same-day transfer system, available to bank broker-dealer clients ONLY, that enables money movem between your bank account carried at your broker-dealer's affiliated bank and your IRA/HSA.					
Obtain the correct routing	☐ Checking OR ☐ Savings					
Obtain the correct routing number from the bank.	Bank Routing Number	Bank Name				
number nom the bank.						
	Bank Account Number final destination	Payee Name(s) Exactly as Shown on Bank Account				

3. Signatures and Dates Form cannot be processed without signatures and dates.

By signing below, you:

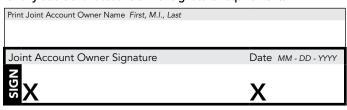
- Authorize the Custodian or successor custodians, your broker-dealer, or their respective agents to update your account based on the information you have provided on this form.
- Authorize National Financial Services LLC ("NFS"), the agent of Fidelity Management Trust Company ("FMTC"), Fidelity Personal Trust Company ("FPTC"), Custodian or successor custodians, to utilize these instructions for payment of the annual IRA/ HSA maintenance fee in accordance with the instructions given by you and/or your brokerdealer to NFS without first confirming those instructions with you directly.
- Understand that: if the fee amount is deducted from your core account, you must ensure that sufficient funds are available; if your core account has insufficient funds to cover the fee amount owed, your account may receive an unpaid fee posting; if an unpaid fee posting exists in your core account, and if you contribute to your IRA/HSA, part or all of the
- contribution will be applied to the unpaid fee posting, however, the full contribution amount will still be reported to the IRS (as applicable); your broker-dealer may sell any or all of your IRA/HSA assets to satisfy the IRA/HSA annual maintenance fee and any associated expenses such as brokerage commissions and/or liquidation charges; if you have an automatic periodic distribution scheduled for November and/or December, you must have an adequate balance in your core account to fund both the distribution amount and the IRA/HSA annual maintenance fee, otherwise the distribution may not be processed, and you may not meet minimum distribution annual requirements, if applicable.
- Authorize your bank (for the EFT or IBP) to accept electronic payments between this account and the bank account identified on the standing payment instructions.
- Understand that NFS reserves the right, but has no obligation, to confirm your brokerdealer'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 and process the actual written notice of any change thereof.
- Further agree to indemnify and hold harmless NFS, FMTC, FPTC 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 brokerdealer with respect to your IRA/HSA.
- Understand and agree that NFS cannot confirm the account registration at a delivering bank or financial institution.
- Agree to pay any transaction fees your bank may charge in connection with transactions involved in opening this account.
- Understand that standing instructions may be purged from your account if the instructions have not been used for an extended period of time.

Either the IRA/HSA owner or an authorized individual must print name, sign, and date.

Print Account Owner Name First, M.I., Last	
Account Owner Signature	Date MM - DD - YYYY
Z	2 000
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$\ddot{\mathbf{x}}$ X	X

If you have elected to pay the annual maintenance fee via transfer (Journal) from a nonretirement account, check with your broker-dealer for any additional account owner signature requirements.





National Financial Services LLC, Member NYSE, SIPC

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