

| |
|----------------|
| 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").

Do NOT use this form for nonretirement accounts.

Note: Contact your investment representative for information on how to request a distribution from your retirement account.

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.

1. Account Owner

| | | |
|------------|------|-----------|
| First Name | M.I. | 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.

Bank #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. Bank Wire EFT

- Check one. ▶ 1st Party *The name on the bank account and the retirement account is the same.*
 3rd Party *The name(s) on the bank account and the retirement account is (are) different.*

- Check one. ▶ Checking
 Savings

Obtain the correct routing number from the bank or attach a voided check. Different routing numbers may be used for Bank Wires and EFT transactions.

| | |
|--|---|
| Bank Routing Number | Bank Name |
| | |
| Bank Account Number <i>final destination</i> | Owner(s) Name(s) Exactly as on Bank Account <i>3rd party only</i> |
| | |

For Bank Wires Only

Use to provide an additional message to receiving bank.
 Use for wiring through an intermediary bank.

| | |
|-------------------------------|---------------------|
| Details | |
| | |
| Further Credit Account Number | Further Credit Name |
| | |

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

| | |
|------------|---------------------|
| SWIFT Code | Destination Country |
| | |

continued on next page



2. Bank Standing Instructions *continued*

Bank #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. Bank Wire EFT

- Check one. ▶ 1st Party *The name on the bank account and the retirement account is the same.*
 3rd Party *The name(s) on the bank account and the retirement account is (are) different.*

- Check one. ▶ Checking
 Savings

Obtain the correct routing number from the bank or attach a voided check. Different routing numbers may be used for Bank Wires and EFT transactions.

| | |
|--|---|
| Bank Routing Number | Bank Name |
| Bank Account Number <i>final destination</i> | Owner(s) Name(s) Exactly as on Bank Account <i>3rd party only</i> |

For Bank Wires Only

Use to provide an additional message to receiving bank.
 Use for wiring through an intermediary bank.

| | |
|-------------------------------|---------------------|
| Details | |
| Further Credit Account Number | Further Credit Name |

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

| | |
|------------|---------------------|
| SWIFT Code | Destination Country |
|------------|---------------------|

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:*

| |
|----------------|
| Account Number |
|----------------|

| |
|----------------|
| Account Number |
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|----------------|
| Account Number |
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| |
|----------------|
| Account Number |
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- Delete Instructions *Provide the "to account" numbers that you wish to delete:*

| |
|----------------|
| Account Number |
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|----------------|
| Account Number |
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| Account Number |
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| Account Number |
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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 and 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.

Either the account owner or an authorized signatory 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 ▶ | ▶ |

OR

| | |
|--|----------------------------|
| Print Authorized Signatory Name <i>First, M.I., Last</i> | |
| Authorized Signatory Signature | Date <i>MM - DD - YYYY</i> |
| SIGN ▶ | ▶ |