

## Recontribution of Qualified Federal Disaster Distribution (Rollover Contribution Form)

Participant's Social Security Number:

Plan Name:

Plan Number:

*(To confirm if the Plan permits recontributions and/or to identify the plan number, please refer to NetBenefits or contact a Fidelity Phone Representative at 800-835-5097.)*

Participant Name (First, MI, Last):

Participant Address:

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Other Phone: \_\_\_\_\_

**Recontribution of a Qualified Federal Disaster Distribution:** If you received one or more distributions from an eligible retirement plan that was a Qualified Federal Disaster Distribution, then you may be able to recontribute part or all of it as a rollover contribution to an eligible retirement plan (such as a 401(a), 401(k) plan, 403(b) plan, 457(b) governmental plan). A Qualified Federal Disaster Distribution is a distribution from an eligible retirement plan to an individual because of a major disaster declared by the President under section 401 of the Robert T. Stafford Disaster Relief and Emergency Assistance Act after December 27, 2020.

Your recontribution must be made within the three-year period beginning on the date after you received your Qualified Federal Disaster Distribution. You may recontribute the money in separate transactions, but the total amount may not be more than the amount of your Qualified Federal Disaster Distribution(s) from all qualified retirement plans that are part of the same group of companies under common control and cannot exceed \$22,000 per disaster. You may be able to request a refund of any Federal income taxes that you originally paid on the taxable amount of your distribution(s) by filing IRS Form 8915 (Qualified Disaster Retirement Plan Distributions and Repayments).

If you received a distribution from a 401(k) or 403(b) plan that was originally used to purchase or construct your principal residence in a disaster area and you were unable to purchase or construct it because of the disaster, then you may recontribute it based on the Plan rules. However, your recontribution must be made within 180 days after the later of the incident date of the disaster or the date that the disaster declaration is issued.

Please contact Fidelity Investments to determine if your Plan accepts recontributions. You may use this form to recontribute your Qualified Federal Disaster Distribution to the Plan identified above but your recontribution will be subject to the Plan's rules.

You must complete and sign this form, and return it based on the instructions in section 3, along with a certified check, cashier’s check or money order **payable to Fidelity Investments Institutional Operations Company (FIOC).**

**1. Qualified Federal Disaster Distribution Information**

Amount of your recontribution to the Plan: \$

Please complete the information below to identify the contribution source(s) of your recontribution.

Contribution Source	Description	Value
Rollover Contributions – Pre-tax and/or Employer Contributions	Amount	\$
	Principal amount of the Roth Contributions	\$
Rollover Contributions – Roth Contributions (If permitted under the Plan)	Earnings on the principal amount of the Roth Contributions	\$
	Identify the year that you made your initial Roth Contributions to the Plan	
Rollover Contributions – After-tax Contributions (If permitted under the Plan)	Principal amount of the after-tax contributions	\$
	Earnings on the principal amount of the after-tax contributions	\$

**Note:** You will be 100% vested in your rollover contributions. Your rollover contribution will be treated as taxable to you when you request a future distribution if you fail to complete this section.

Your money will be invested based on the investment elections that you have on file for your contributions. The entire amount will be invested in the Plan’s designated default investment option if you have not made an election unless the Plan requires you to make an investment election. Please visit NetBenefits or contact a phone representative before you submit this form if you need to make any investment elections.

**2. Participant Certification:**

By signing below, I certify that I received one or more distributions from an eligible retirement plan that qualifies as a Qualified Federal Disaster Distribution described above, and that I am eligible to recontribute part or all of it to the Plan. I further certify that the information on this form is true, accurate and complete. I understand that my recontribution may be refunded to me in the future, with any earnings thereon, if it is not permitted by the Plan or it is later determined that part or all of it was ineligible to be recontributed to the Plan.

Participant Name (Print)	Participant Signature (Sign)	Date: MM/DD/YYYY

### 3. PLAN SPONSOR Approval

By signing below, you:

- Approve the Qualified Federal Disaster Recontribution.
- Acknowledge that the Qualified Federal Disaster Recontribution, as requested on this form, is permitted by the Plan.
- Certify that you are authorized to sign on behalf of the plan sponsor and that Fidelity has a record of your authorization.

Authorized Signature: \_\_\_\_\_

Print name of authorized individual signing above: \_\_\_\_\_

Date: \_\_\_\_\_

**IMPORTANT NOTICE:** FIDELITY INVESTMENTS CANNOT PROCESS YOUR QUALIFIED BIRTH OR ADOPTION RECONTRIBUTION REQUEST IF ANY OF THE REQUIRED INFORMATION IS INCOMPLETE OR ANY REQUIRED SIGNATURES ARE MISSING.

#### 4 Mailing Instructions:

Please mail this form and a cashier's check, certified check or money order to the following address:

Regular Mail	Express Mail
Fidelity Investments P.O. Box 770002 Cincinnati, OH 45277-0090	Fidelity Investments Mail zone KC1E 100 Crosby Parkway Covington, KY 41015