

# Fidelity Investments

## 457 or Nonqualified Beneficiary Designation Form



**Instructions:** Please complete this form and sign it on the back. In the future, you may revoke the beneficiary designation and designate a different beneficiary by submitting a new Beneficiary Designation form to Fidelity.

Unless otherwise directed, return this completed form:

### Digitally using the NetBenefits® Mobile App

Download the NetBenefits® app through the App Store® or Google Play™ store.

**Tap: Actions > Send a Document**

Or use one of these alternate methods:

#### Regular Mail

Fidelity Investments  
PO Box 770002  
Cincinnati, OH 45277-0090

#### Overnight Mail

Fidelity Investments  
100 Crosby Parkway, KC1E  
Covington, KY 41015

**Questions?** Go to [fidelity.com/atwork](http://fidelity.com/atwork) or call 1-800-343-0860 or for the hearing impaired dial 711, business days (except NYSE holidays) from 8 AM to midnight (ET).

## 1. YOUR INFORMATION

Social Security #: -- Date of Birth: --

First Name:

Last Name:

Mailing Address:

Address Line 2:

City:  State:

Zip:

Daytime Phone: -- Evening Phone: --

E-mail:

Name of Employer:  City/State of Employer:

Plan Number (if known):  Type of Plan:  457(b)  Section 83  457(f)

I am:  Single OR  Married Name of Site/Division:

## 2. DESIGNATING YOUR BENEFICIARY(IES)

**You are not limited to two primary and one contingent beneficiaries.** To assign additional beneficiaries, or to designate a more complex beneficiary designation, please attach, sign, and date a separate piece of paper with the additional beneficiary information.

**When designating primary and contingent beneficiaries, please use whole percentages** and be sure that the percentages for each group of beneficiaries total 100%. Your primary beneficiary cannot be your contingent beneficiary. If you designate a trust as a beneficiary, please include the trust's name and the date the trust was created.

Unless otherwise specified by your plan, if more than one person is named and no percentages are indicated, payment will be made in equal shares to your primary beneficiaries who survive you. If a percentage is indicated and a primary beneficiary(ies) does not survive you, the percentage of that beneficiary's designated share shall be divided among the surviving primary beneficiaries in proportion to the percentage selected for them.

**Please check here if you have more than two primary or one contingent beneficiaries.**

Fidelity Investments Institutional Operations Company LLC, 245 Summer Street, Boston, MA 02210.



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## 2. DESIGNATING YOUR BENEFICIARY(IES) (CONTINUED)

### Primary Beneficiary(ies)

I hereby designate the person(s) named below as primary beneficiary(ies) to receive payment of the value of my account(s) under the plan upon my death.

1. Individual:	OR	Trust Name:	
<input type="text"/>		<input type="text"/>	
Social Security Number:	OR	Tax ID Number:	Percentage:
<input type="text"/>		<input type="text"/>	<input type="text"/> %
Date of Birth or Trust Date:		Relationship to Applicant:	
<input type="text"/>		<input type="checkbox"/> Spouse OR <input type="checkbox"/> Trust OR <input type="checkbox"/> Other	
2. Individual:	OR	Trust Name:	
<input type="text"/>		<input type="text"/>	
Social Security Number:	OR	Tax ID Number:	Percentage:
<input type="text"/>		<input type="text"/>	<input type="text"/> %
Date of Birth or Trust Date:		Relationship to Applicant:	
<input type="text"/>		<input type="checkbox"/> Spouse OR <input type="checkbox"/> Trust OR <input type="checkbox"/> Other	<b>Total = 100%</b>

### Contingent Beneficiary(ies)

If there is no primary beneficiary living at the time of my death, I hereby specify that the value of my account is to be distributed to my contingent beneficiary(ies) listed below. **Please note:** Your primary beneficiary cannot be your contingent beneficiary.

1. Individual:	OR	Trust Name:	
<input type="text"/>		<input type="text"/>	
Social Security Number:	OR	Tax ID Number:	Percentage:
<input type="text"/>		<input type="text"/>	<input type="text"/> %
Date of Birth or Trust Date:		Relationship to Applicant:	
<input type="text"/>		<input type="checkbox"/> Spouse OR <input type="checkbox"/> Trust OR <input type="checkbox"/> Other	<b>Total = 100%</b>

Payment to contingent beneficiary(ies) will be made according to the same instruction listed under the Primary Beneficiary(ies) section.

## 3. SIGNATURE AND AUTHORIZATION

**Individual Authorization:** By executing this form

- I certify under penalties of perjury that my Social Security number in Section 1 on this form is correct.
- I am aware that the beneficiary information included in this form becomes effective when delivered to Fidelity and will remain in effect until I deliver another completed and signed Beneficiary Designation Form to Fidelity with a later date.
- I understand that I may designate a beneficiary for my assets accumulated under the plan and that if I choose not to designate a beneficiary, my beneficiary will be made based on the provisions of the plan.
- I am aware that the beneficiary information provided herein shall apply to all of my accounts under the plan listed in Section 1 and shall replace all previous designation(s) I have made to my account under the plan.

Your Signature:  Date:



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