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Fidelity INVESTMENTS

Questions? Go to fidelity.com/toa or call 1-800-396-8982.

Transfer Assets To Fidelity

Use this form to move some or all assets from another firm to Fidelity. Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Helpful To Know

- This form isn't right for all transfers. Call Fidelity if you are:
  - converting an IRA to a Roth IRA
  - rolling over from a 401(k), 403(b) or other workplace plan
  - transferring from a non-retirement checking account
  - transferring between retirement accounts and there is ANY difference in how the names appear on the accounts
- Most transfers are faster at *fidelity.com/toa.*
- Use one form for each account you're transferring out of.
- Transfers can create legal issues (especially around beneficiaries and form of ownership) as well as tax issues and financial risks. Consult the appropriate professionals before making a transfer.
- **Avoid delays! Attach a recent account statement!**

1. Account Where Your Assets Are Now

Attach ALL PAGES of a recent statement for this account.

Account Number	Firm Name
SaulsSaulsOBMFGJE	Apple Inc

Firm Address	City
One Apple Park Way	Cupertino

State/Province	Zip/Postal Code	Country	Firm Phone
CA	95014		4 0 8 9 9 6 1 0 1 0

If unsure, leave blank. **Firm Type** ☒ Brokerage/Trust ☐ Mutual Fund ☐ Bank/Credit Union ☐ Insurance Co. ☐ Transfer Agent

Account Owner(s)

List ALL names EXACTLY as they appear on this account. Include any trustees.

***UGMA/UTMAs:** List minor first, then custodian.*

First Name	M.I.	Last Name	Social Security Number
MATTHEW	J	SAULS	5 3 3 0 8 4 7 4 3
Additional Owner First Name	M.I.	Last Name	Social Security Number
Trust or Entity Name *If applicable*			Tax ID Number *If applicable*

Check one.

Non-Retirement Accounts
☒ Individual ☐ Joint
☐ Trust ☐ UGMA/UTMA
☐ Estate ☐ Corp/business

Retirement Accounts
☐ Traditional, SEP, or Rollover IRA
☐ Roth IRA ☐ Inherited IRA
☐ SIMPLE IRA ☐ Inherited Roth IRA

Other *For example, HSA*
Account Type:

2. Transfer INTO This Fidelity Account

Check one.

☐ New Fidelity account
Attach a completed new account application.

☒ Existing Fidelity account: Account Number X 6 9 9 2 1 8 9 1

Account Owner(s)

List ALL names EXACTLY. The two accounts must have at least one owner in common.

***UGMA/UTMAs:** List minor first, then custodian.*

Phone numbers are for questions about this transfer only; they do not update your Fidelity contact information.

First Name	M.I.	Last Name	Social Security Number
MATTHEW	J	SAULS	5 3 3 0 8 4 7 4 3
Additional Owner First Name	M.I.	Last Name	Social Security Number
Trust or Entity Name *If applicable*			Tax ID Number *If applicable*

Evening Phone	Daytime Phone	Extension

Check one. If this is a different type of account than the one above, call Fidelity.

Non-Retirement Accounts
☒ Individual ☐ Joint
☐ Trust ☐ UGMA/UTMA
☐ Estate ☐ Corp/business

Retirement Accounts
☐ Traditional, SEP, or Rollover IRA
☐ Roth IRA ☐ Inherited IRA
☐ SIMPLE IRA ☐ Inherited Roth IRA

Other *For example, HSA*
Account Type:

3. Assets to Transfer to Fidelity

Your assets will be transferred as shown at right. EXCEPTIONS:

- if you hold a mutual fund directly with a fund firm (not in a brokerage account), you can request that we instruct the fund firm to sell your shares and transfer the cash
- if a money market fund is non-transferable, we will instruct the fund firm to sell the shares and transfer the cash
- if any other asset is non-transferable, it will remain where it is

In all other cases, if you want a non-cash asset transferred as cash, you must liquidate the asset at your current firm before submitting this form.

Asset Type	Generally Transferred As
Cash, annuities, CDs held at a bank	Cash; see options below
CDs held in a brokerage account	CDs ("in kind")
Mutual funds	Shares ("in kind")
Stocks, bonds, other individual securities	Securities ("in kind")

Option A: Transfer ENTIRE Brokerage Account

Brokerage accounts ONLY. If unsure of account type, call Fidelity.

☐ Transfer ENTIRE account. *Skip to Section 4; do NOT list any investments below.*

Option B: All Other Transfers

If you checked "Option A" above, Skip to Section 4.

Use this section for partial transfers of brokerage accounts, and for all transfers from banks, mutual fund companies, insurance companies, and transfer agents. Complete all sections that apply. We only transfer assets that you identify.

Cash

☐ Transfer ALL cash

☒ Transfer ONLY the following amount of cash:

Cash Transfer Amount
$ 23,843,262

Mutual Funds

For each fund, provide all required information and check one transfer option.

Brokerage accounts: *Your only options are "Transfer ALL" or "Transfer ONLY."*

Fund Name	Fund Symbol	Account Number

Total transfer of this fund

☐ Transfer ALL shares as shares

☐ Sell ALL shares and transfer as cash

Partial transfer of this fund

☐ Transfer ONLY this many shares as shares:

☐ Sell ONLY this many shares and transfer as cash:

Number of Shares

Fund Name	Fund Symbol	Account Number

Total transfer of this fund

☐ Transfer ALL shares as shares

☐ Sell ALL shares and transfer as cash

Partial transfer of this fund

☐ Transfer ONLY this many shares as shares:

☐ Sell ONLY this many shares and transfer as cash:

Number of Shares

Fund Name	Fund Symbol	Account Number

Total transfer of this fund

☐ Transfer ALL shares as shares

☐ Sell ALL shares and transfer as cash

Partial transfer of this fund

☐ Transfer ONLY this many shares as shares:

☐ Sell ONLY this many shares and transfer as cash:

Number of Shares

Fund Name	Fund Symbol	Account Number

Total transfer of this fund

☐ Transfer ALL shares as shares

☐ Sell ALL shares and transfer as cash

Partial transfer of this fund

☐ Transfer ONLY this many shares as shares:

☐ Sell ONLY this many shares and transfer as cash:

Number of Shares

Certificates of Deposit (CDs)

For this option, submit your request at least 21 days, but no more than 60 days, before maturity, to ensure that we can process your request.

☐ CDs held in a brokerage account: Transfer ALL as CDs

☐ CDs held directly with a bank: Transfer cash from ALL CDs that mature on:

CD Maturity Date *MM – DD – YYYY*

☐ CDs held directly with a bank: Cash in ALL CDs immediately and transfer cash

You may be charged a penalty for early withdrawal.

Individual Securities *Includes stocks, bonds, ETFs, options, and Unit Investment Trusts; for DRIP shares, see below*

Provide all required information, including number of shares of each security to transfer.

To transfer shares (including fractional shares) as cash, you must sell them through the firm that currently holds them.

Security Symbol or Name		Number of Shares/Units
	☐ ALL shares/units ☐ ONLY this many shares/units:	
	☐ ALL shares/units ☐ ONLY this many shares/units:	
	☐ ALL shares/units ☐ ONLY this many shares/units:	
	☐ ALL shares/units ☐ ONLY this many shares/units:	

DRIP Shares (DRS) *Direct-registered shares; must be transferred through a transfer agent*

Transfer Agent: *Send securities electronically.*

☐ Transfer ALL shares and sell fraction

☐ Transfer ALL shares except fraction

☐ Transfer ALL shares, sell fraction, and close account

☐ Transfer ONLY these eligible shares (whole shares only):

Security Symbol or Name	Number of Shares/Units

Annuities *All annuities must be surrendered (cashed in), which could mean tax implications, penalties, fees, and loss of product features.*

Contact the annuity firm or Fidelity for additional requirements before you submit this form.

☐ Surrender annuity and transfer cash immediately

☐ Surrender annuity and transfer cash on this date:

Date *MM – DD – YYYY*

☐ Surrender ONLY the following amount of the annuity and transfer cash:

Cash Transfer Amount

$

☐ Surrender ONLY the penalty-free portion of annuity and transfer cash

4. Differences in Owner Name(s) or Account Type

If there is ANY difference in the owner name(s) or account type between Section 1 and Section 2, you must take the following steps:

Non-retirement Accounts: If the difference(s) between your Section 1 and Section 2 information are listed at right, attach any documents indicated. If the difference is not listed, contact Fidelity for instructions BEFORE you submit this form. In either case, all owners must sign this form, and the terms in Section 5 for "Differences in owner name(s) or account type" apply to you.

Retirement Accounts: Contact Fidelity for instructions BEFORE you submit this form.

Differences Between Accounts	Documents to Attach
Last name changed	Marriage/divorce certificate
First/middle changed or listed differently	Letter explaining difference
One account is joint, the other is individual	None
Different trustee(s) listed	Updated trust document

5. Signatures and Dates

ALL owners of BOTH accounts must sign and date.

By signing below, you:

- Direct Fidelity and the delivering firm to act on all instructions given on this form, including transferring assets to Fidelity.
- Accept that any assets not readily transferable might not be transferred within the time frames set by FINRA or other applicable authorities.
- Authorize the delivering firm to sell any non-transferable money fund shares, and any shares of other mutual funds that you have requested be sold, and transfer the proceeds as cash.
- Accept that Fidelity is not responsible for changes in the value of assets that may occur during the transfer process.
- Affirm that you are aware of any tax or financial implications that may arise in connection with this transfer or with the sale or liquidation of any assets prior to transfer, including penalties, fees, financial losses, or losses of product features or benefits.
- Authorize the delivering firm to contact you about any assets that cannot be transferred.
- Authorize the delivering firm to deduct from your account any fees that you owe, and, if necessary, to sell assets in your account to pay those fees.
- Instruct the delivering firm to transfer any physical certificates in good deliverable form, including any necessary tax waivers.
- Authorize the delivering firm to cancel any open orders on your account when it receives this form.
- Affirm that you have destroyed or returned any credit/debit cards and unused checks associated with your account at the delivering firm, if closing that account.

All retirement accounts

- Affirm, if you are 70½ or older, that this transfer will not violate IRS rules on required minimum distributions.

SIMPLE IRAs

- Accept that the Date of First Participation will be the date that contributions are first deposited to your SIMPLE IRA at Fidelity by your employer, unless you provide a Date of First Participation.

Differences in owner name(s) or account type

- Acknowledge the existence of any differences in the owner name(s) or account type between Section 1 and Section 2.

ALL owners of BOTH accounts must sign and date. If an owner's name appears differently on different accounts, that owner must sign both ways. Ask Fidelity or your current firm if you need a signature guarantee (available from most banks, credit unions, and other financial institutions). If you do, provide one for each owner. A notary seal/stamp is NOT a signature guarantee.

Print Owner Name

DATE — Date *MM – DD – YYYY*

SIGN — Owner Signature

MEDALLION SIGNATURE GUARANTEE

Print Owner Name

DATE — Date *MM – DD – YYYY*

SIGN — Owner Signature

MEDALLION SIGNATURE GUARANTEE

Print Owner Name

DATE — Date *MM – DD – YYYY*

SIGN — Owner Signature

MEDALLION SIGNATURE GUARANTEE

Did you print and sign the form? Send the form and a copy of your non-Fidelity account statement to Fidelity.

Questions? Go to fidelity.com/toa or call 1-800-396-8982.

Register and track the progress of your transfer at fidelity.com/toa.

Regular mail
Fidelity Investments
Attention: TOA
PO Box 770001
Cincinnati, OH 45277-0036

Overnight mail
Fidelity Investments
Attention: TOA
100 Crosby Parkway
Mailzone: KC1A
Covington, KY 41015

On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates.
Brokerage services are provided by Fidelity Brokerage Services LLC, Member NYSE, SIPC.

SAULS, MATTHEW J

For Custodian/Trustee Use Only The appropriate entity in the table below accepts appointment as successor custodian/trustee for the account identified on this form. Transfer the account as instructed, on a trustee-to-trustee basis, to the appropriate successor custodian/trustee, c/o National Financial Services LLC. The new account name will be National Financial Services LLC, agent for the successor custodian/trustee.

Receiving Account Type:	Successor Custodian/Trustee:
Fidelity Retirement Account	Fidelity Management Trust Company
Fidelity Health Savings Account	Fidelity Personal Trust Company

Successor/Custodian/Trustee's Representative	Date *MM / DD / YYYY*
Signature	