Accour	nt Nur	nber			

#### Premiere Select®

# **Standing Payment Instructions**

Use this form to establish, change, or delete 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 Defined Contribution Retirement Plan Account, and Defined Contribution Beneficiary Distribution Account (collectively referred to as "retirement account") and Health Savings Account ("HSA") held through National Financial Services LLC ("NFS").

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.

#### Helpful to Know

- ONLY use this form for retirement or HSA accounts.
- Standing Instructions that are added to your account may be purged from the system due to inactivity after an extended period of time.
- If establishing 1st Party EFT, or 3rd Party EFT with a common owner on the brokerage and bank account, a copy of a voided check or statement must be provided to your Broker-Dealer with this form.
- If you are using standing Electronic Funds Transfer (EFT) instructions to pay your IRA or HSA Annual Maintenance Fee, the instructions must be from a 1st Party account.
- If you are using standing journal instructions to pay your IRA or HSA Annual Maintenance Fee, the account must be an account registered to you either individually or as a joint owner and cannot be a retirement account or HSA.
- Note: Contact your investment representative for information on how to request a distribution from your account and/or how to establish IRA or HSA annual maintenance fee payment instructions, as applicable.

### 1. Account Owner

First Name	Middle Name	Last Name	
Additional Account Numbers			
Account Number	ccount Number		Account Number
Account Number	account Number		Account Number

## 2. Bank Standing Instructions

Bank Standing Instructions allow you to move money between your retirement or HSA 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, SEP-IRAs, and HSAs only. If establishing 1st Party EFT, or 3rd Party EFT with a common owner, a voided check or statement must be included with this form.

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## 2. Bank Standing Instructions continued

	Bank Wire				
Check one ▶	☐ Establish new instructions ☐ Change existing instructions ☐ Delete existing instructions	Line Number		If you have multiple in and are changing or c instruction, include the the line number from representative.	e line number. Obtain
Obtain the correct  routing number from the  bank. Different routing  numbers may be used  for Bank Wires and EFT	Bank Routing Number  Bank Account Number final destination	Bank Name Payee Name(s) Exactly as Shown	on Bank Account		
transactions. Payee Name(s) and Address is REQUIRED.	Payee Address				
	City		State/Province	Zip/Postal Code	
Use to provide an additional message to					
receiving bank. 🕨	Details				
Use for wiring through an intermediary bank.	Further Credit Account Number		Further Credit Name	9	
REQUIRED ► if the bank account is OUTSIDE the U.S.	SWIFT Code	De	estination Country		
	EFT Instructions #1				
Check one. ▶	☐ Establish new instructions ☐ Change existing instructions ☐ Delete existing instructions	Line Number		If you have multiple in and are changing or c instruction, include th the line number from representative.	e line number. Obtain
Check one. ▶	☐ 1st Party All of the owner(s) of both receipts and disbursemer☐ Use these instructions to pa	nts.		oank account. This op	otion can be used for
	3rd Party None of the owner(s on the brokerage account are of for disbursements but only per	on the bank account (3rd po mits receipts if there is a c	arty with commoi	n owner(s)). This optic	on can always be used
Check one. ▶	☐ Checking ☐ ☐ Saving	S			
Obtain the correct routing number from the bank. Different routing	Bank Routing Number	Bank Name			
numbers may be used for Bank Wires and EFT transactions.	Bank Account Number final destination	Payee Name(s) Exactly as Shown	on Bank Account		

continued on next page

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## 2. Bank Standing Instructions continued

	EFT Instructions #2					
Check one. ▶	Establish new instructions  Change existing instructions  Delete existing instructions	Line Number  Line Number  Line number  Line number  Line number  Line number  Line number from your investment representative.				
Check one. ▶	both receipts and disbursement Use these instructions to party. Sard Party. None of the owner on the brokerage account are constant.	on the brokerage account are also on the bank account. This option can be used for onts.  By the Annual Maintenance Fee.  By on the brokerage account are owner(s) on the bank account OR some of the owner(s) on the bank account (3rd party with common owner(s)). This option can always be used rmits receipts if there is a common owner on the brokerage and bank account.				
Check one.	Checking OR Saving	ıs				
Obtain the correct prouting number from the bank. Different routing	Bank Routing Number	Bank Name				
numbers may be used for Bank Wires and EFT transactions.	Bank Account Number final destination	Payee Name(s) Exactly as Shown on Bank Account				
Journal Standing Instruct		Securities from the account(s) provided at the top of this form to another brokerage				
account ("to account") pro Certain journals and <b>D</b>		the "to account" numbers that you wish to establish:				
transfers are not permissible from retirement or HSA		ay the Annual Maintenance Fee Payment will be transferred from the first account				
accounts to other brokerage accounts or retirement accounts.	Account Number	Account Number				
Consult with your investment representative for further information.	Account Number	Account Number				
	☐ Delete Instructions Provide th	e "to account" numbers that you wish to delete:				
	Account Number	Account Number				
	Account Number	Account Number				

## 4. Check Disbursement Standing Instructions

Check Disbursement Standing Instructions allow you to request that a check be paid and mailed to the name and address on record or to an alternate payee and/or alternate address listed below.

	Payee #1						
Check one. ▶	☐ Establish new instructions ☐ Change existing instructions ☐ Delete existing instructions	Line Number		a ir ti	nd are nstruct he line	ave multiple instructions established e changing or deleting an existing ion, include the line number. Obtain e number from your investment entative.	
Check one. ▶	<ul> <li>1st Party Paid and mailed to natifieds can be modified.</li> <li>3rd Party Paid and/or mailed to natified and natified</li></ul>				the M	emo and Check Stub Information	
Avoid any account number or SSN that compromises a customer's	Payee						
identity. If needed, use	OP					ers total including "C/O"	
the Memo and Check Stub Information fields.	Attn:		C/	′O			
otas illionilation notasi	Address						
	City			State/Province		Zip/Postal Code	
Information provided in the Memo field will print on the check but will	Memo maximum 30 characters						
not appear visible in the window of the envelope.	Check Stub Information maximum 100 chara	cters					
	Payee #2						
Check one. ▶	Establish new instructions					ave multiple instructions established changing or deleting an existing	
	Change existing instructions	Line Number				ion, include the line number. Obtain	
	☐ Delete existing instructions					number from your investment entative.	
Check one. ▶	1st Party Paid and mailed to n fields can be modified.	name and address on	record. If s		'	emo and Check Stub Information	
	☐ 3rd Party Paid and/or mailed	to an alternate name(s	s) and/or a	ddress.			
A	Payee						
Avoid any account number or SSN that							
compromises a customer's	Attention maximum 32 characters total include	ding "Attn:"	Car	re of maximum 32	charact	ers total including "C/O"	
identity. If needed, use the Memo and Check  Atten:  Attention maximum 32 characters total including "Attn:"  Attention maximum 32 characters total including "Attn:"  C/O				Ü			
Stub Information fields.	Address						
	City			State/Province		Zip/Postal Code	
	- 4						
Information provided in <b>&gt;</b>	Memo maximum 30 characters						
the Memo field will print							
on the check but will not appear visible in the	Check Stub Information maximum 100 characters						
window of the envelope.	Check Stab information indximum for characters						

### 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") and Fidelity
   Personal Trust Company, FSB ("FPTC"),
   Custodian/Trustee, to utilize these
   payment instructions when you request
   a distribution(s) from your 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 your Broker-Dealer, 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 Broker-Dealer with respect to your retirement or HSA account.
- Understand and agree that NFS cannot confirm the account registration at a receiving bank or financial institution.
- Understand that these instructions may be purged from your account if the instructions have not been used for an extended period of time.

Either the account 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
X X	

National Financial Services LLC, Member NYSE, SIPC

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