# Custodian Change (UGMA Contract)—Annuities

**Use this form to replace a custodian on an existing, UGMA-owned Fidelity annuity contract.** Type on screen or print out and fill in using CAPITAL letters and black ink. If you need more room for information or signatures, make a copy of the relevant page.

## Helpful to Know

- To change the custodian on multiple contracts, submit a separate form for each contract.
- If the custodian being removed is deceased, the following are required to complete processing:
  - a copy of the custodian's death certificate

  AND
  - a copy of the minor's birth certificate naming the parents, one of whom will be the custodian
  - a copy of the legal document naming the new custodian, if the custodian is not the minor's parent
- **eDelivery**
  - You can sign up for eDelivery of certain financial information for this annuity. Simply go to Fidelity.com/edelivery, click *Sign up for eDelivery,* and log in to select your delivery preferences.
  - If you currently hold a Fidelity personal investing account or another annuity, the delivery preferences you have selected for your financial documents will automatically apply to similar documents (as available) for this annuity.
- A new custodian must sign and date this form.
- Any *resigning* custodian must sign and date this form and provide a signature guarantee on his/her signature.

## 1. Contract/UGMA to Be Changed

| UGMA Name | **Annuity Contract Number** |
|---|---|
| | |

## 2. Remove Custodian *Resigning custodian MUST sign and obtain a signature guarantee in Section 4.*

*For the custodian being removed, provide name and check one reason for removal.*

| Name of Individual Being Removed |
|---|
| |

☐ Death ☐ Resignation ☐ Incapacitation

## 3. Add New Custodian

### New Custodian

| First Name | M.I. | Last Name | Social Security or Taxpayer ID Number |
|---|---|---|---|
| | | | |

| Date of Birth *MM DD YYYY* | Evening Phone | Daytime Phone | Extension |
|---|---|---|---|
| | | | |

### Legal/Residential Address

*Provide the address used for tax reporting. Cannot be a P.O. box, mail drop, or c/o.*

| Address | | | |
|---|---|---|---|
| | | | |
| **City** | **State/Province** | **ZIP/Postal Code** | **Country** |
| | | | |

### Mailing Address

☐ Same as legal/residential address ▷ *Default if no other information indicated below.*

| Address | | | |
|---|---|---|---|
| | | | |
| **City** | **State/Province** | **ZIP/Postal Code** | **Country** |
| | | | |

**Form continues. Next page MUST BE completed.** ▶▶

## 4. Resigning Custodian Signature and Date

▷ *Skip to Section 5 if NO custodian is resigning.*

By signing below, you:

- Certify that you are resigning as a custodian of the UGMA named on this form.

***A medallion signature guarantee is required.*** *You can get a medallion signature guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.*

Print Resigning Custodian Name

DATE — Date *MM DD YYYY*

SIGN — Resigning Custodian Signature

MEDALLION SIGNATURE GUARANTEE

***Individual providing signature guarantee*** *Providing this information will avoid delay or rejection of your request.*

| Guarantor Name | Phone | Extension |
|---|---|---|
| | | |

## 5. New Custodian Signature and Date

*New custodian must sign and date.*

By signing below, you:

- Affirm that you have read and understand the contract for this annuity.
- Certify that all information you provided is correct to the best of your knowledge.
- Accept that this form supersedes any previously provided certifications.
- Agree to notify Fidelity immediately of any change in fact or circumstance for yourself.

### Important:

- If the custodian being removed is deceased, the following are required to complete processing:
  - a copy of the custodian's death certificate

  AND
  - a copy of the minor's birth certificate naming the parents, one of whom will be the custodian
  - a copy of the legal document naming the new custodian, if the custodian is not the minor's parent

Print Custodian Name

SIGN — Custodian Signature — Date *MM DD YYYY*

**Did you sign the form?** Send the ENTIRE form to Fidelity Investments. After the changes are registered, the contract owner will receive a Revised Annuity Profile.

**Questions?** Call 800-634-9361.

| **Regular Mail** *Except NY* | **Regular Mail** *NY only* | **Overnight Mail** |
|---|---|---|
| Annuity Service Center<br>P.O. Box 770001<br>Cincinnati, OH 45277-0050 | Annuity Service Center<br>P.O. Box 770001<br>Cincinnati, OH 45277-0051 | Fidelity Investments<br>100 Crosby Parkway, KC2Q<br>Covington, KY 41015 |

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