



Premiere Select® IRA

Recharacterization Request

Use this form to request a recharacterization of all or any portion of the contributions made to a Premiere Select IRA or qualified rollover contribution to a Roth IRA or IRA Beneficiary Distribution Account (IRA-BDA). Do NOT use this form for conversions or reconversions. Type on screen or print out and fill in using CAPITAL letters and black ink.

Recharacterizations generally must be completed by the federal income tax filing deadline (including extensions) for the year for which the contribution was made to the first IRA. Recharacterizations may be subject to IRS limits. Employer contributions to a SEP-IRA or a SIMPLE IRA generally cannot be recharacterized as contributions to another IRA. A recharacterization is not considered a rollover for purposes of the one-rollover-per-year-rule. The recharacterization request may not be revoked or modified after it has been processed. Consult a tax advisor or your investment representative for rules and deadlines.

1. Account Owner

Account Owner First Name	M.I.	Last Name

2. Recharacterization Instructions

From Account

Provide account number.

Check one. Traditional IRA
 IRA-BDA
 Roth IRA
 Roth IRA-BDA
 Rollover IRA
 SEP-IRA

Consult a tax advisor to determine eligibility of SEP-IRA. ▶

To Account If you do not have an existing Premiere Select IRA, please contact your investment representative.

Provide account number.

Check one. Traditional IRA
 IRA-BDA
 Roth IRA
 Roth IRA-BDA
 Rollover IRA
 SEP-IRA
 SIMPLE-IRA

Consult a tax advisor to determine eligibility of SEP-IRA. ▶

Contribution Type

Check one. Annual contribution
 Roth IRA conversion contribution
 Qualified rollover contribution

Provide Tax Year of Contribution.

Provide Date of Contribution.



Recharacterization Details *Include original contribution amount plus any earnings for both Cash and In-kind selections.*

Check one and provide all required information.

Cash:

Amount
\$.

Shares/Units will be reregistered in "To" account specified.

In-kind:

Investment Name	CUSIP or Fund Symbol	Number of Shares/Units

3. Signature and Date *Form cannot be processed without signature and date.*

By signing below, you:

- notify, authorize and direct Fidelity Management Trust Company, Custodian of my Premiere Select IRA (or its successors, affiliates, agents, or assigns) to recharacterize, via a trustee-to-trustee transfer, the amount of the contribution(s) and net income allocable to such contribution(s) to or from my Premiere Select Roth IRA or Roth IRA-BDA indicated above
- certify that the information supplied on this form is complete and accurate
 - acknowledge that you are electing to treat the contribution(s) indicated above as if it was made to the IRA to which you are recharacterizing such contribution(s)
 - accept full responsibility for complying with IRS requirements on recharacterization of your IRA contribution(s)
- indemnify the Custodian of your Premiere Select IRA, its agent(s), its successors, its affiliates and employees from any and all liability in the event that you fail to meet any applicable IRS requirements with respect to the recharacterization of any IRA contribution

Account Owner Name <small>First, M.I., Last</small>	
Account Owner Signature	Date <small>MM - DD - YYYY</small>
SIGN ▶	▶

