



Cost Basis Update Form

Use this form to provide Fidelity with your adjusted tax basis information (often referred to as "cost basis" information) for certain individual securities or mutual fund positions in your nonretirement account. You may also use this form to change certain cost basis information that you previously provided to Fidelity. For your convenience, cost basis information may also be updated on *Fidelity.com*. Cost basis for unknown positions may be updated on the *Positions* tab by selecting the position, clicking the *Purchase History/Lots* button, and then clicking the *Enter cost basis information for this position* link.

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.

Cost basis on securities purchased at Fidelity cannot be changed by customers. Cost basis provided by another broker for transferred securities may be changed for noncovered tax lots. Covered cost basis provided to Fidelity from the prior broker generally cannot be updated unless additional information is provided to support the reason why the covered cost basis is inaccurate.

Helpful to Know

- We will update our cost basis information records with the information you provide here and report it on future statements as "customer provided."
- The IRS requires Fidelity to report cost basis information on covered securities that are sold. A security is covered if it is a stock purchased on or after 1/1/2011, any mutual fund share purchased on or after 1/1/2012, any note, bond, or option purchased on or after 1/1/2014 for less complex debt, or after 1/1/2015 for complex debt. Cost basis information on noncovered securities is not reported to the IRS.
- Calculating your cost basis for tax purposes can be complicated, particularly if you have purchased and sold shares over a long period of time. We encourage you to review IRS Publication 550, *Investment Income and Expenses (Including Capital Gains and Losses)*, or consult your tax advisor for assistance. Fidelity does not provide tax advice and cannot assist you with cost basis calculations for shares with unknown cost basis.

1. Account Owner(s)

Name	Fidelity Account Number
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2. Cost Basis Information

Complete the table that follows, attaching additional pages as necessary. If you acquired shares of a particular security at different times (through dividend reinvestment, for example), identify each acquisition separately. If you are providing tax basis information for mutual fund holdings and you intend to report any gains or losses to the IRS using the average cost method, it may be more convenient to write the information for all shares on one line. Note, however, that Fidelity may be unable to determine the holding period if you choose this approach.

CUSIP or Symbol: The nine-character identification or trading symbol of the individual security or mutual fund.

Date Transferred to Fidelity: The date in which the cost basis became unknown, generally when transferred to Fidelity. All cost basis information related to each tax lot should be provided as it was on the date when the securities were transferred to Fidelity.

Date Acquired: Generally, the date the individual security or mutual fund was purchased. Certain rules may require that this date be adjusted, including, but not limited to, inheritance, wash sale adjustments, and certain taxable corporate actions.

Number of Shares in Tax Lot: The number of shares remaining from the purchase for which you are providing cost basis information.

Total Cost Basis of Tax Lot: The dollar amount you paid to acquire the shares indicated, including any commissions, purchase charges, or other fees properly added to the original cost basis, as well as any other required adjustments due to corporate actions or the application of special rules.

Gifted or Inherited Status: If the shares were acquired as an inheritance or a gift, indicate by using the letter "I" or "G," respectively.

Gift Date: If the shares were acquired as a gift, indicate the date the shares came into your possession from the donor.

Total Gift Value of Tax Lot: If the shares were acquired as a gift, indicate the value of the tax lot on the date the shares came into your possession from the donor. This value is generally the number of shares in the tax lot multiplied by the fair market value on the date of the gift.

Cost Basis Information continues on next page. ►►



3. Adjusting Covered Cost Basis

In limited situations, covered cost basis on file at Fidelity may need to be adjusted. If your request is to update covered cost basis on file, please indicate one of the following reasons so that we may review the request. Skip to Section 4 if you are not requesting adjustments to covered cost basis already on file.

- Shares were inherited at another broker and cost basis was not stepped up prior to transferring to Fidelity.
- Other (Include an explanation below and any supporting documentation with this form.)

Other Reason

Disclaimer: Basis on file at Fidelity may differ from the original purchase price because of, but not limited to, inheritance, gifting, reorganizations, return of capital payments, wash sale adjustments, and fixed income adjustments. By making this request, you acknowledge and confirm that cost basis currently on file is inaccurate.

4. Signatures and Dates *Form cannot be processed without signature(s) and date(s)*

In the section below, "Fidelity," "us," and "we" refer to Fidelity Brokerage Services LLC and National Financial Services LLC and their affiliates, and their employees, agents, representatives, shareholders, successors, and assigns as the context may require; "you" and "account owner" refer to the owner indicated on the account form; and for any account with more than one owner (such as a joint or trust account), "you" and "account owner" or "account owners" refer to all owners, collectively and individually.

By signing below, you:

- Authorize and instruct Fidelity to include the information you have provided above on any of your statements.
- Understand and agree that Fidelity will not verify the accuracy of the information you have provided.
- Acknowledge that Fidelity does not make any representation or give any advice regarding your use of the information.
- Agree that Fidelity will not be liable for any loss or damage arising out of your use of the information.
- Understand that the information will be denoted on your statements as "customer provided."
- Acknowledge that Fidelity does not provide tax or legal advice.
- Understand and agree that if you have questions about your individual tax situation, you will consult a tax advisor.
- Acknowledge that tax information contained herein is not intended or written to be used, and it cannot be used by you, for the purpose of avoiding penalties that may be imposed on taxpayers.

One authorized signature is required unless you have a Mutual Fund Account (the account number begins with a 2 followed by two letters), in which case all owners must sign.

PRINT OWNER NAME	
OWNER SIGNATURE	TODAY'S DATE MM DD YYYY
SIGN X	X

PRINT OWNER NAME	
OWNER SIGNATURE	TODAY'S DATE MM DD YYYY
SIGN X	X

Did you sign the form? Send the ENTIRE form and any attachments to Fidelity Investments.

Questions? Go to Fidelity.com/costbasis or call 800-343-3548.

Regular mail

Fidelity Investments
PO Box 770001
Cincinnati, OH 45277-0001

Overnight mail

Fidelity Investments
100 Crosby Parkway KC1K
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. 461081.5.0 (10/19)

