



|                |
|----------------|
| Account Number |
|                |

# EFT/Bank Wire Request Nonretirement

Use this form to request a one-time transaction via Electronic Funds Transfer ("EFT") or Bank Wire. Authorized agents/Advisors with proper authority can sign this form to request first-party transactions and only third-party transactions using standing instructions.

This form is for U.S. dollar transactions only. If this bank account cannot accept U.S. dollars, you should use the Outgoing International Bank Wire form to perform the appropriate foreign exchange prior to the transfer. Withdrawals are paid from the balance in your core account. EFT receipts will be deposited to your core account. You must ensure that there are sufficient funds in the core account to cover a disbursement request. Requests must be received by 4:00 p.m. ET for same-day processing. Type on screen or fill in using CAPITAL letters and black ink.

## Authorized agent/Advisor

|  |                   |
|--|-------------------|
| Firm Name  | G Number          |
| David A. Boden - Intelliwealth Financial Advisors, LTD | G 1 1 7 2 1 8 4 5 |
| Account Name   |                   |
|  |                   |

## 1. Distribution Instructions

Provide payout amount.  
Check one.

Specified Amount

|                  |
|------------------|
| Amount           |
| \$ _____ . _____ |

OR

Entire Core Balance  
Keep account open.

Close Account  
Entire Core Balance will be sent.

### Future Process Date *Optional*

Consult with your  
Authorized agent/Advisor  
for further information.

|                 |
|-----------------|
| Date MM DD YYYY |
|                 |

**Note:** By specifying a future process date, you are directing your Authorized agent/Advisor to schedule your one-time transaction on this specified date. If you do not specify a future process date, your Authorized agent/Advisor will execute your transaction request in accordance with standard procedures.

## 2. Signatures and Dates *Form cannot be processed without signatures and dates.*

By signing this form, you:

All Owner(s)

- Authorize Fidelity Brokerage Services LLC ("FBS") to make transfers of amounts payable to you or the third-party payee named in this form.
- Authorize and request the specified bank to accept such entries from FBS, either upon the submission of this form or, if the transaction is a Remittance Transfer, after you have consented to the prepayment disclosure, which has been provided to you by telephone.
- Acknowledge and understand by requesting a bank wire to transfer funds to an account with an account owner(s) that is (are) different from the owner(s) on your Fidelity Brokerage Account, you are transferring legal ownership of those funds to that (those) account owner(s).
- Indemnify and hold harmless Fidelity and its

affiliates and their respective officers, directors, employees, and agents from and against any and all losses, costs, claims or financial obligations that may arise from any act or omission of your Authorized agent/Advisor with respect to your account.

- Accept that Fidelity reserves the right, but not the obligation, to confirm your Authorized agent's/Advisor's instructions with you prior to acting on the instructions or indication of interest, as the case may be.
- Acknowledge that, if your transaction is an international wire subject to Part B of the Electronic Funds Transfer Act, the completion of this form is an indication of interest in this transaction. The transaction contemplated herein cannot be completed until you consent to the prepayment disclosure provided to you by telephone.
- Authorize and direct Fidelity to act upon the

instruction of you OR your Authorized Agent/Advisor to move money pursuant to the Asset Movement Authorization granted by you from your Fidelity Brokerage account to the bank account or via check disbursement to the recipient that you designate.

*Trustees only*

- Certify that you have the power and authority under the trust agreement and applicable law to enter into all transactions, sales, and redemptions of mutual funds, and deliver any documents necessary to open and maintain accounts on behalf of the trust.

*Authorized agent/Advisor only*

- Represent that you are an authorized person of the above-named Advisor Firm, and that you are acting pursuant to the level of Asset Movement Authorization granted by the account owner(s) as defined in the applicable Brokerage Account Client Agreement.

**Either an Account Owner or an Authorized agent/Advisor must print name, sign, and date. By signing below, I am agreeing to the terms and conditions and the details of my transaction. Each additional page of instructions has my initials and date.**

|   |                     |  |
|---|---------------------|--|
| Print Account Owner Name <i>First, M.I., Last</i> | OR                  | Print Authorized agent/Advisor Name <i>First, M.I., Last</i> |
|   |                     |  |
| Account Owner Signature                           | Date MM - DD - YYYY | Authorized agent/Advisor Signature                           |
| <b>SIGN</b> ▶                                     | ▶                   | <b>SIGN</b> ▶  |

### 3. Electronic Funds Transfer (EFT)

Allow 2-3 business days after the date a disbursement request is processed for funds to reach your bank or credit union.

Check A or B.  A. 1st Party EFT *All of the owners on the brokerage account are also on the bank account. To transfer funds via EFT, you MUST have standing EFT instructions on your account.*

Check one. ▶  Disbursement to Bank Account  
 Receipt from Bank Account

|             |
|-------------|
| Line Number |
|             |

**Authorized agent/Advisor:** *If you have multiple standing instructions, enter the line number.*

B. 3rd Party EFT *All of the owners on the brokerage account are not on the bank account.*  
 Check one. ▶  Use Standing Instructions on File

|             |
|-------------|
| Line Number |
|             |

**Authorized agent/Advisor:** *If you have multiple standing instructions, enter the line number.*

Alternate Instructions *Not applicable when using Standing Instructions.*  
 Check one. ▶  Checking     Savings

Obtain the correct routing number from the bank. Different routing numbers may be used for Bank Wires and EFT transactions.

|  |  |
|--|--|
| Bank Routing Number                          | Bank Name                                |
|  |  |
| Bank Account Number <i>final destination</i> | Payee Name(s) Exactly as on Bank Account |
|  |  |

### 4. Bank Wire

A wire fee may be charged and deducted from the core balance by Fidelity. Additionally, if your transaction is an international wire subject to Part B of the Electronic Funds Transfer Act (a "Remittance Transfer"), the completion of this form is an indication of interest in this transaction. The transaction cannot be completed until you consent to prepayment disclosure provided to you by telephone. The transaction may be routed through a different intermediary bank.

Use Standing Instructions on File

|             |
|-------------|
| Line Number |
|             |

**Authorized agent/Advisor:** *If you have multiple standing instructions, enter the line number.*

Alternate Instructions *Not applicable when using Standing Instructions.*

Obtain the correct routing number from the bank. Different routing numbers may be used for Bank Wires and EFT transactions.

|  |  |                     |         |
|--|--|---------------------|---------|
| Routing Number                               | Bank Name                                |                     |         |
|  |  |                     |         |
| Further Credit Account Number                | Further Credit Name                      |                     |         |
|  |  |                     |         |
| Bank Account Number <i>final destination</i> | Payee Name(s) Exactly as on Bank Account |                     |         |
|  |  |                     |         |
| Payee Address                                |  |                     |         |
|  |  |                     |         |
| City   | State/Province                           | Zip/Postal Code     | Country |
|  |  |                     |         |
| Details                                      |  |                     |         |
|  |  |                     |         |
| SWIFT Code                                   |  | Destination Country |         |
|  |  |                     |         |

Use for wiring through an intermediary bank.

Use to provide an additional message to receiving bank.

REQUIRED if the bank account is OUTSIDE the U.S.

*It is your responsibility to ensure that the bank account outside the U.S. can accept U.S. dollars.*

**Account Owner**

|         |                 |
|---------|-----------------|
| Initial | Date MM DD YYYY |
|         |                 |





## 5. Advisor Attestation *for Third Party Requests*

**Authorized agent/Advisor Attestation for Third-Party Disbursement Requests (this attestation must be completed for any third-party EFT or wire request)**

Disbursements to third parties present significant potential fraud risk to advisors, their clients, and custodians. To help reduce this risk, Fidelity requests that the designated Authorized agent/Advisor provide the following representations for any instruction provided herein. Receipt of these representations does not preclude Fidelity from confirming instructions with clients prior to acting upon the instructions.

By signing below, Authorized agent/Advisor ("We") make the following representations regarding this instruction ("Instruction") We direct to Fidelity on behalf of clients ("Clients"):

- We have verbally confirmed this Instruction with Clients.
- This representation is a supplement to our Investment Advisor Representation and Indemnification Letter or Intermediary Acknowledgment Letter as applicable. We are financially responsible for losses resulting from any Instruction We forward to Fidelity on Clients' behalf. We agree to indemnify and hold harmless Fidelity and its officers, directors, employees, agents, control persons and affiliates from and against all claims, losses, damages, liabilities and expenses (including reasonable attorneys' fees) in the event that any Client or other party alleges that the Instruction We gave to Fidelity was unauthorized or exceeded the scope of our authority.

|  |  |  |  |
|--|--|--|--|
| Print Designated Principal (or Designee) Name <i>First, M.I., Last</i>             |  | Title  |  |
| DAVID A. BODEN   |  | MANAGING MEMBER  |  |
| Designated Principal (or Designee) Signature                                       |  | Date <i>MM - DD - YYYY</i>   |  |
|   |  |   |  |
| Print Additional Signer Name <i>(if appropriate) First, M.I., Last</i>             |  | Title  |  |
| Additional Signer Signature (if appropriate)                                       |  | Date <i>MM - DD - YYYY</i>   |  |
|  |  |  |  |

Sign here if your firm requires a secondary Authorized agent/Advisor to approve transactions.