

▶ **GETTING STARTED: LOG IN**

New to Fidelity.com?

If you've never logged in to Fidelity.com, click **Customer Log In** from the top menu bar, then select **Register Now** under **New User**. You'll need to enter the last 4 digits of your Social Security number, and your first name, last name, and date of birth, to complete your online registration and create a username and password.

To view and monitor your accounts online, simply log in:

- 1. Enter your **username**.
- 2. Enter your **password**.
- 3. Click **Log In**.



Need Help Logging In?

From the Log In page, click **Having trouble with your username or password?** to reset your username or to look up your password.

▶ **DELIVERY PREFERENCES**

For a smart way to help save time and get organized, sign up for eDelivery of your account statements, trade confirmations, prospectuses, and shareholder reports. eDelivery allows you to receive an email notification that a document is available for viewing on Fidelity.com. Fidelity's enhanced eDelivery is safe, secure, and easy to use, and allows you to control delivery preferences for documents related to your accounts. To select eDelivery, click **Accounts & Trade**, then go to **Statements**. Under Account Settings, click **Edit** to the right of Delivery Preferences, select eDelivery.

▶ **VIEW AND PRINT STATEMENTS**

Get up to 24 months of statements and confirms online. Click **Accounts & Trade**, then go to **Statements**.

Questions?

Contact your advisor with any questions on the accounts they manage.

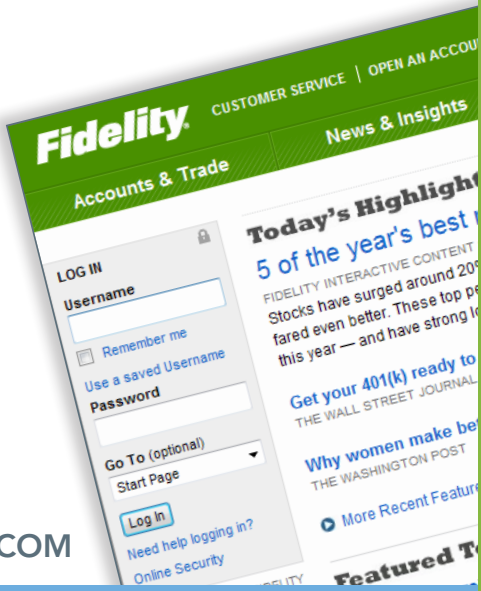


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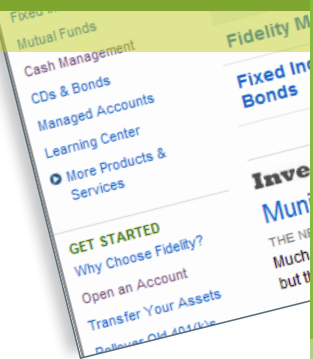
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Top Things to View and Do on Fidelity.com



FIDELITY.COM

User Guide



The Fidelity.com Advantage

Now you can easily monitor all your Fidelity Investments accounts, including those your advisor manages, from a single, secure Web site. Fidelity.com is designed to provide you with the information and resources you need, virtually 24 hours a day, to help you work more effectively with your advisor to help meet your financial goals.

Stay connected with Fidelity.

 Go to [Fidelity.mobi](https://fidelity.mobi) to access Fidelity Mobile®.

Fidelity.com lets you monitor your accounts securely—virtually any time.

MONITOR YOUR ACCOUNTS ONLINE

View your balances, holdings, and transactions on all your Fidelity Investments accounts, including those you manage with your advisor. Click **Accounts & Trade**, then go to **Portfolio** to get started.

RESEARCH INVESTMENTS

Search, analyze, and monitor investments online to stay informed and help gain insight when discussing your portfolio with your advisor. Access a large source of free, independent stock research from firms such as Morningstar and Standard & Poor's.® Click **Research** to get started.

ACCESS TAX FORMS AND TOOLS

View your tax forms, reports, and confirms online, and monitor your year-to-date tax situation. Import tax information into certain tax software. Click **Accounts & Trade**, then go to **Statements**.

VIEW ALL YOUR ACCOUNTS

To help you and your advisor get a complete picture of your finances, you can securely access everything from your investment, retirement, and bank accounts to your loans, mortgages, and credit cards on the same secure site. You also enjoy reward programs, email, and online calendars. Click **Accounts & Trade**, then go to **Full View**.®

GET AUTOMATIC UPDATES AND REMINDERS

Follow your investments by setting up account Alerts with Fidelity. Alerts enable you to:

- Monitor activity and trading in your accounts.
- Track the price of a particular security.
- Receive account balances and positions.
- Be notified of stock, bond, and mutual fund events.
- Subscribe to market commentaries and reports.

Click **Research**, then go to **Alerts**. Contact your advisor with any questions.

MOVE MONEY

Electronically move money between your bank and Fidelity Investments accounts. Pay bills, write checks, and enroll in direct deposit, automatic investing, and more. Click **Customer Service** in the top menu bar, then go to **Manage Account Features**. Then click **Bank Information to Transfer Money** for more options on depositing, withdrawing, and transferring money.