

Getting started with your new Fidelity account

Here's a simple checklist to help you make the most of your new Fidelity account.

STEPS TO TAKE NOW

Review new account materials



Check up on your finances



You'll be receiving helpful materials outlining your plan's move to Fidelity.

- ✓ Review your current account balance and investments
- ✓ Understand key dates and important plan changes

Use this opportunity to assess your current and future financial goals.

- ✓ Review all your savings and investing accounts
- ✓ Align your saving and spending habits to support your plans for the future

STEPS TO TAKE WHEN YOUR PLAN IS AT FIDELITY

Set up your NetBenefits® account



NetBenefits® is the site where you can manage your workplace savings account. If you already have Fidelity accounts, you can use your login information to access NetBenefits®. If you need to set up a username and password:

- ✓ Visit NetBenefits.com
- ✓ Follow the instructions to register
- ✓ Add your preferred email address and mobile number

Review your account



Once your NetBenefits® account is set up, review your account balances, contribution percentage, and investments.

- ✓ Log in to NetBenefits.com
- ✓ Select *Accounts & Benefits* from the top navigation bar
- ✓ Review the *Manage contributions* tab
- ✓ Review the *Manage investments* tab

Update your beneficiary designations



It's important that your beneficiaries are set up the way you want, especially if you haven't reviewed them in a while.

Take advantage of resources



Discover something new on NetBenefits®:

- ✓ **Learn**—Review educational articles, infographics, videos, and more
- ✓ **Planning**—Model and plan for your financial goals using the online tools

Go mobile



Download the NetBenefits® mobile app from your favorite app source, and manage your workplace benefits anytime, anywhere. With the mobile app, you can:

- ✓ Securely log in and check your balance
- ✓ Receive notifications on security and transaction status
- ✓ Easily monitor your plan and goals

Investing involves risk, including risk of loss.

Fidelity and the Fidelity Investments logo are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, SIPC,

900 Salem Street, Smithfield, RI 02917

© 2017–2025 FMR LLC. All rights reserved.

787746.12.0

