

Getting started with your new Fidelity® account



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

Place client
logo here

Set up your NetBenefits® account

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

- ✓ Visit [NetBenefits.com](https://netbenefits.com)
- ✓ Follow the instructions to register. To get started, you will need your DOB and Social Security number
- ✓ Add your preferred email address and phone number by simply going to your [Profile](#)

Review your account

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

- ✓ Log in to [NetBenefits.com](https://netbenefits.com)
- ✓ Select *Accounts & Benefits* from the top navigation bar
- ✓ Review the *Manage* [contributions tab](#)
- ✓ Review the *Manage* [investments tab](#)

Update your beneficiary information

Decide where your money goes. [Adding a beneficiary](#) can save time and stress—and it's easy to do. Visit your profile to add or update a beneficiary.

Take advantage of resources

Discover something new on NetBenefits:

- ✓ **Learn**—Review educational articles, infographics, videos, and more
- ✓ **Plan**—Model and plan for your financial goals using 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 and simply keep track of goals, view balances, update investments, and more
- ✓ Manage documents, contributions, and investments quickly and easily
- ✓ Stay up-to-date with notifications on transactions and security

Review your finances

Use this opportunity to review all your savings and investing accounts to ensure that your investments are aligned with your financial goals.

Investing involves risk, including risk of loss.
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 Have more questions? Call Fidelity at [xxx-xxx-xxxx](tel:18003457397)