Online Account Information: Easy to Access, Simple to Update

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Contact Us

If you have questions during the process, please call a Fidelity representative at **877-208-0098**, Monday through Friday, between 8:30 a.m. and 7:00 p.m. Eastern time.

FIDELITY INSTITUTIONAL®

ORIGINAL INSIGHT / TAILORED ACCESS / DIVERSE INVESTMENT CAPABILITIES

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Accessing Your Account

accounts.fidelity.com | **Desktop View** [Back to Home]

Our website for Fidelity Advisor clients, **accounts.fidelity.com**, lets you access and manage your account information quickly and securely. Now, more intuitive navigation and simpler screens make it even easier to check your balances or access documents, as well as update addresses, beneficiaries, and account options.

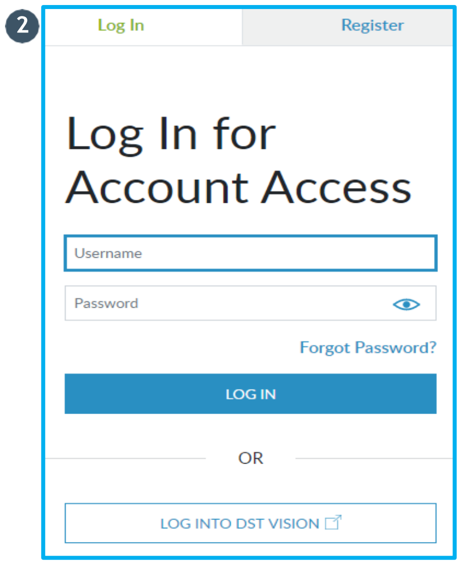
1. Go to **accounts.fidelity.com**

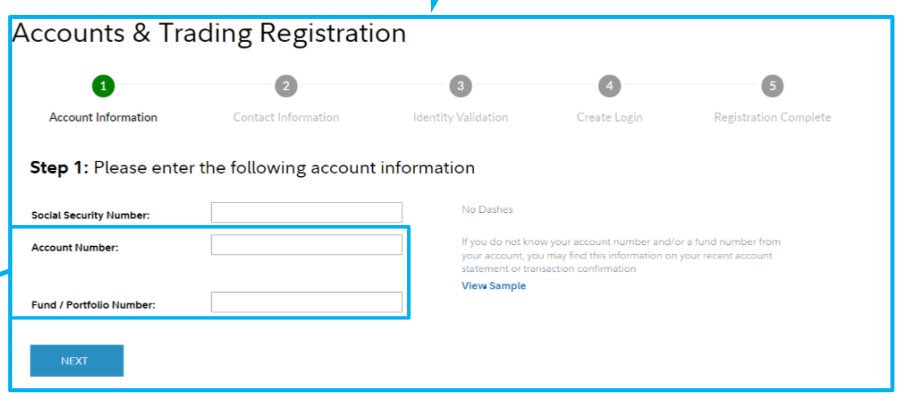
2. If you already have a Username and Password, enter it here. After logging in, you will arrive at the **Portfolio** page (Shown on page 4 of this flyer).

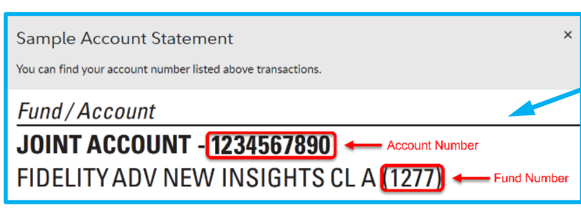
3. If you are a new visitor to the site, click the **Register** tab, then the **Register Here** link.

   When registering, you will be prompted to complete the **Accounts & Trading Registration requirements**.*

   *To register for the first time, you will need your SSN/TIN, Account number, and Fund/Portfolio number.







Setting Up eDelivery

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Choose eDelivery: eDelivery is fast, secure, and convenient. Fidelity will notify you by email as soon as your latest documents are available for viewing on **accounts.fidelity.com**. View, print, and save a copy of the documents you need.

Security Settings

eDelivery Settings

Change Username

Change Password

Security Preferences

eDelivery Preferences

Fidelity Investments invites you to choose eDelivery for a fast, secure, and environmentally-friendly way of receiving account-related documents. We will notify you by email as soon as your documents are available to view. Note: Any updates will be applied to all of your accounts and positions. Your eDelivery preferences only apply to accounts for which you are listed as the primary account owner. [Custodial accounts (i.e. UGMA/UTMA) are not eligible for eDelivery]

What email would you like to use? Enter your email address

Which account-related documents would you like eDelivered?

- [x] All Documents
- [x] Monthly/Quarterly Statements
- [x] Year-End Statements
- [x] Trade & Account Maintenance Confirm
- [x] Tax Forms
- [x] Prospectuses, Offering Statements And Financial Reports
- [x] Proxy Voting Materials

Agree to terms By clicking the "SAVE PREFERENCES" button below, you acknowledge that you have read and agreed to the **Electronic Delivery Agreement**

SAVE PREFERENCES

Portfolio

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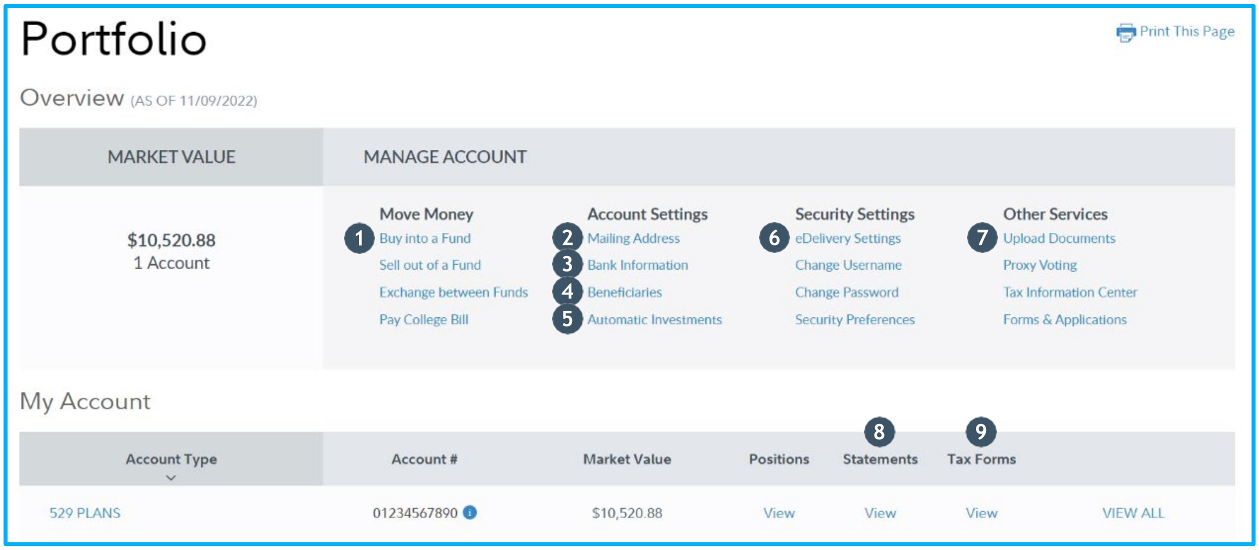
Easily manage information on an account without sending in forms or waiting for updates to be processed.



1 Move Money

Execute a variety of trades on your account including buy, sell, or exchange between funds. 529 account holders can also pay educational expenses directly to a school via check.
Note: Some account types do not allow certain transactions to be made online.

2 Update an Address

Make a change to your address on record for the accounts associated with your linked social security number.
Note: Updates to 529 beneficiary addresses are excluded.

3 Link to Bank Account

Set up Electronic Fund Transfer (EFT) to invest or withdraw money any time it's convenient for you, without the hassle of writing and mailing checks. EFT also lets you take advantage of our Automatic Investment Program.
Note: 3rd party bank must be submitted in writing with notarized signatures.
For your security, a 10-calendar day waiting period for withdrawals exists for new instructions.

4 Check your Beneficiaries

It is important to periodically check your IRA beneficiary information and make necessary updates. You can add, delete, and edit beneficiary information all on one screen.
Note: 529/Trust/Entity type beneficiaries cannot be updated online and must be submitted in writing.

5 Set up an Automatic Investment Program

You choose the amount, date, and frequency of your periodic investments.

6 Security Settings

Provide an extra layer of security by signing up for electronic delivery of documents, adding secure contact methods (2FA), and routinely updating your username and password.

7 Upload documents

Submit fax approved documents securely online directly to Fidelity.

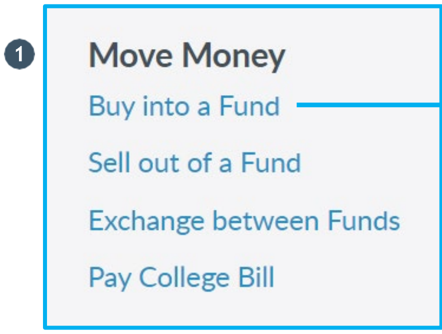
8 Access Statements and Confirmations

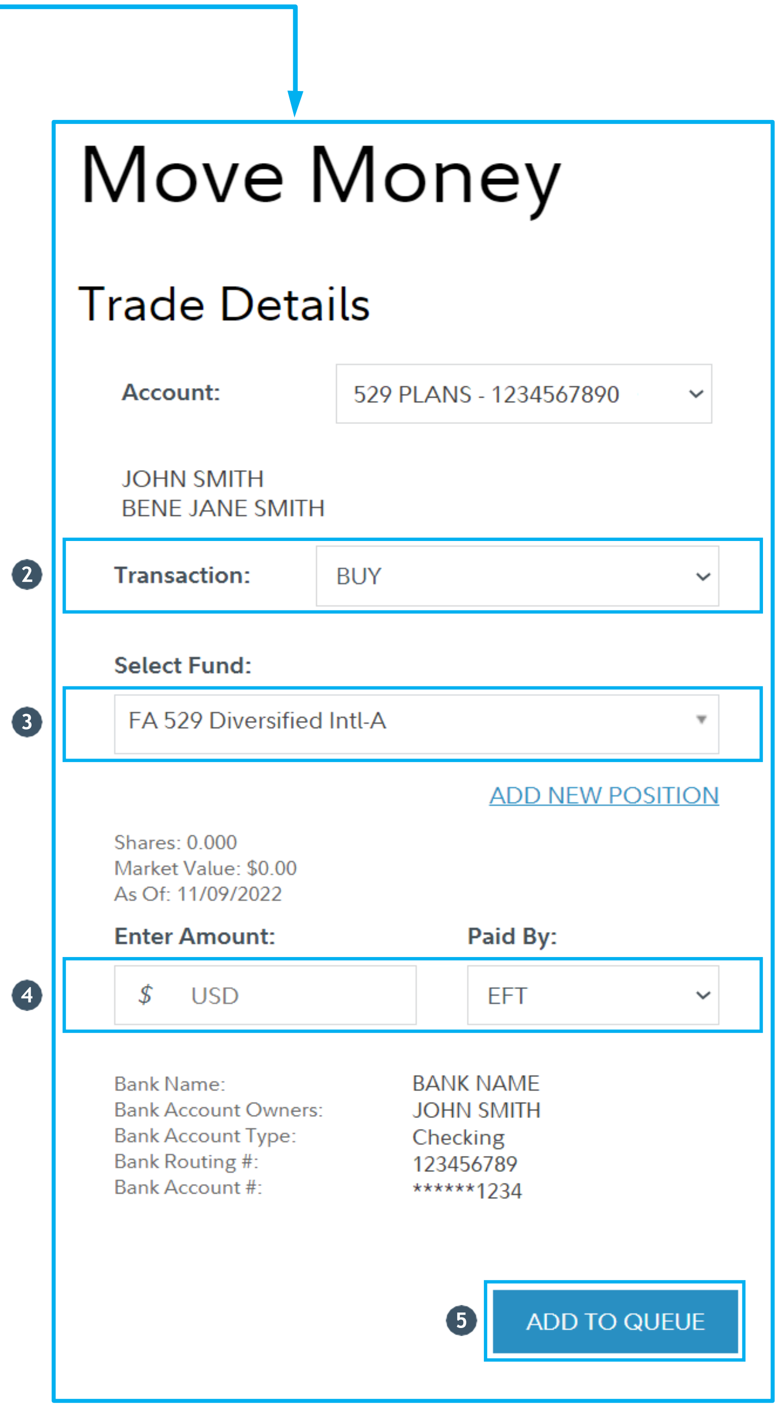
View your account statements or confirmations of transaction activity.

9 Access Tax Forms

View, print, or download your available tax forms for accounts with tax reporting.
Note: Excludes Secondary owners, UGMA/UTMA Custodians, Trust accounts, and 529 beneficiary distributions.

Direct access to **buy**, **sell**, or **exchange investments** across your accounts as you are ready.





1 **Trade**

Access the Trade functionality through Move Money or Account Options.

2 **Transaction Type**

Choose **BUY** (purchase), **SELL** (redeem), or **EXCHANGE** (move between funds) from the drop-down menu.

3 **Select a fund**

Select one of your existing funds from the drop-down or add a new fund position to your account by choosing ADD NEW POSITION (for Buy and Exchange only).

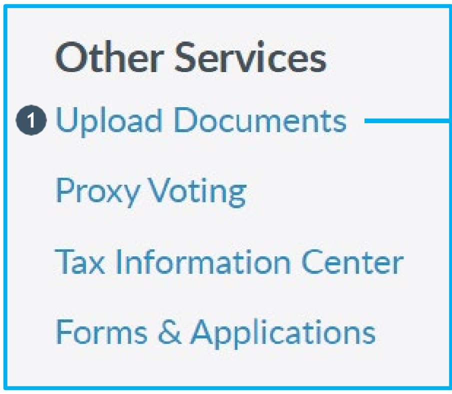
4 **Select payment method and amount**

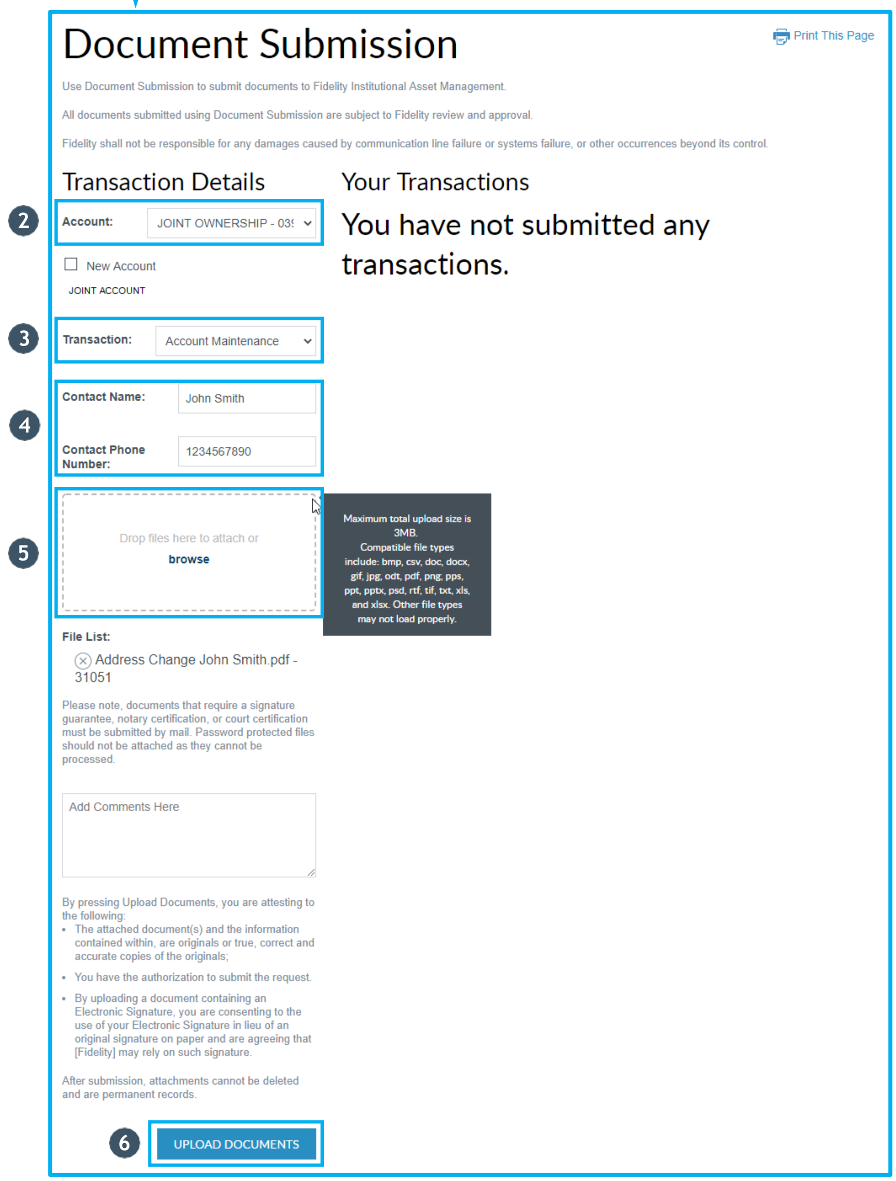
Enter the amount for your transaction and use the drop-down to select a payment option.

5 **Preview your trade**

Select ADD TO QUEUE to add your trade to the queue. Select CONTINUE when you are ready to review and submit your trade(s).

All forms and documents currently accepted by fax can also be **submitted electronically online**, excluding any documents requiring a signature guarantee or original certification.





1. **Document Submission**
   Access the document upload feature through Other Services.

2. **Account**
   Choose the account that aligns with your requested update or add a new account to your portfolio by checking the New Account box.

3. **Select the transaction type**
   Select the applicable transaction type from the drop-down including Account Maintenance, Financial Transaction, or Other.

4. **Enter your contact information**
   Include your name and phone number for any questions that may arise.

5. **Attach a document**
   Drag and drop or select BROWSE to attach your file(s) to the list and add a brief comment to support your request.

6. **Upload your documents**
   Select UPLOAD DOCUMENTS to submit your file(s). A confirmation number will generate upon a successful submission.

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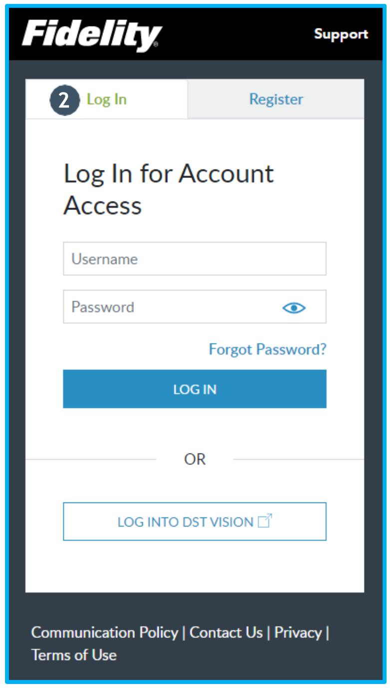

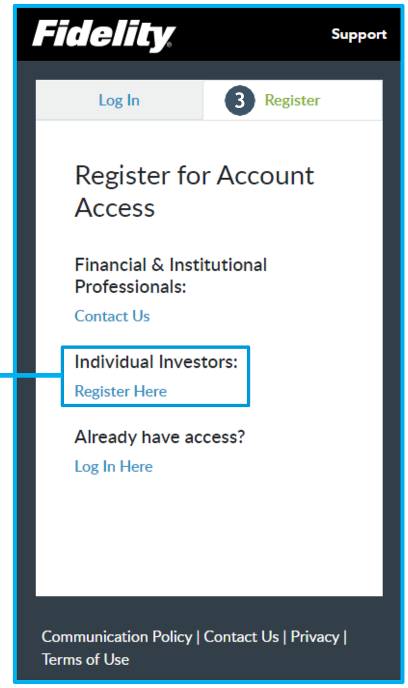

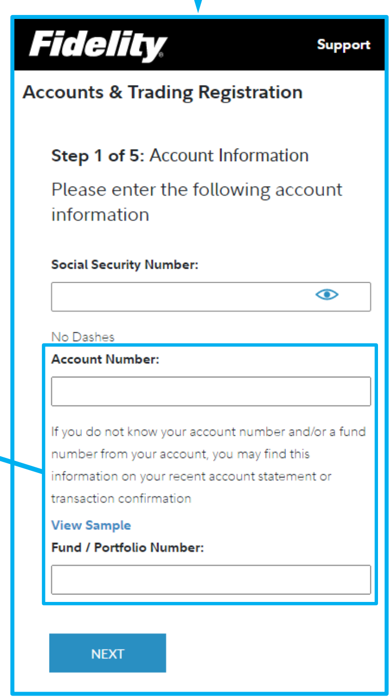

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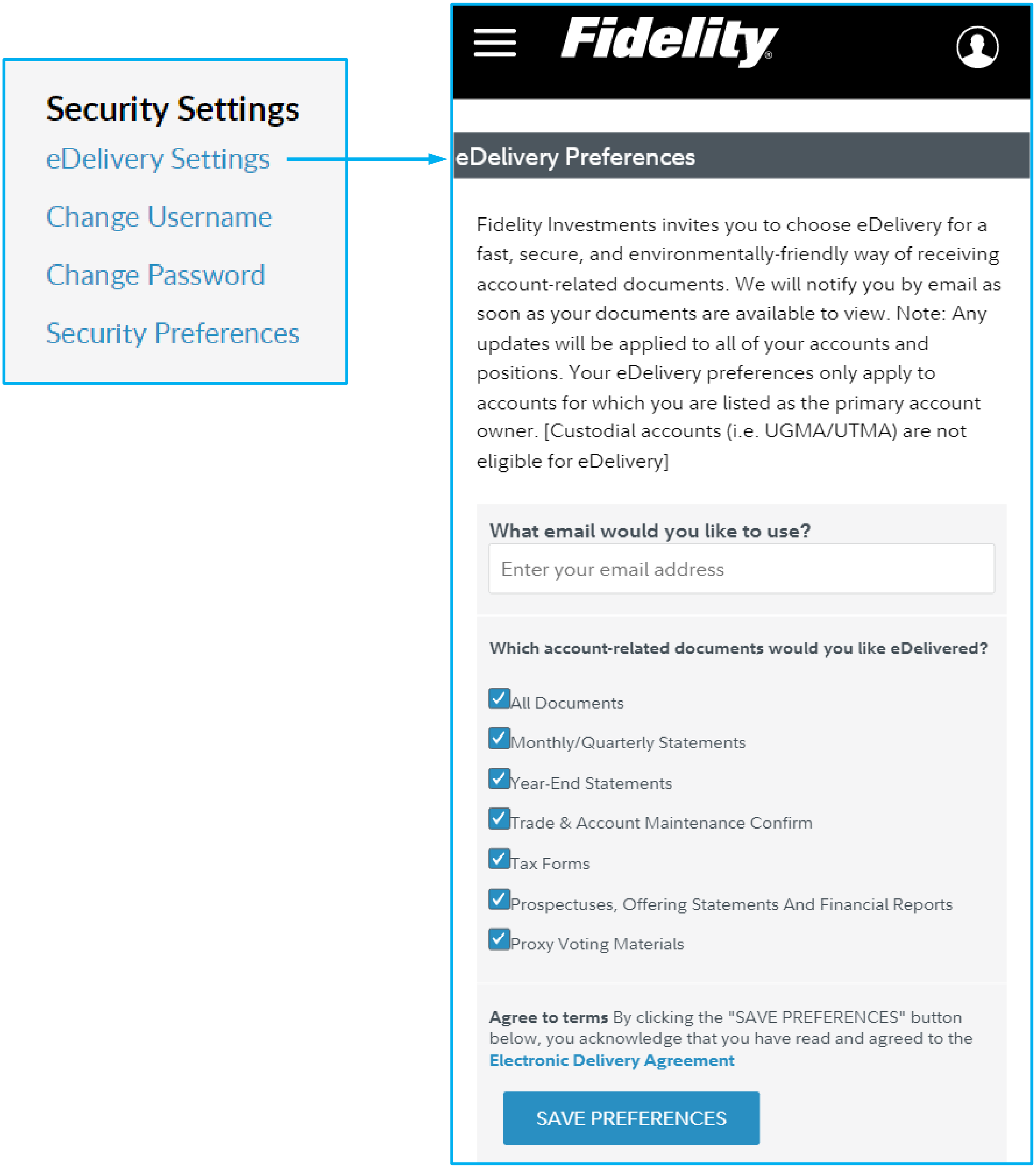
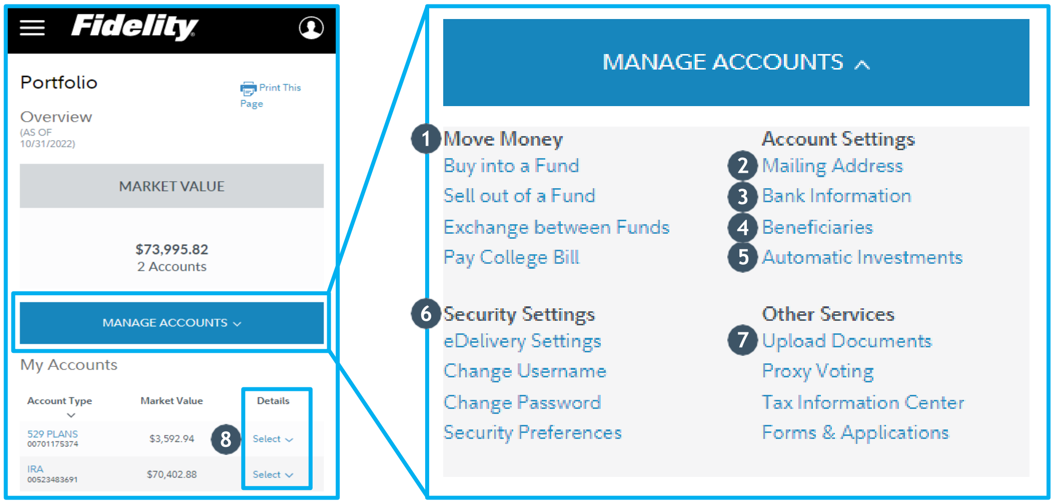


Easily manage information on an account without sending in forms or waiting for updates to be processed. To access account options, press the **Manage Accounts** button.



❶ Move Money

Execute a variety of trades on your account including buy, sell, or exchange between funds. 529 account holders can also pay educational expenses directly to a school via check.
Note: 529 and IRA BDA exchanges cannot be processed online.

❷ Update an Address

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❺ Set up an Automatic Investment Program

You choose the amount, date, and frequency of your periodic investments.

❻ Security Settings

Provide an extra layer of security by signing up for electronic delivery of documents, adding secure contact methods (2FA), and routinely updating your username and password.

❼ Upload documents

Submit fax approved documents securely online directly to Fidelity.

❽ Access statements, confirmations, and tax forms

Under the Details column, press Select for access to view account statements or confirmations of transaction activity. You can also view, print or download your available tax forms for accounts with tax reporting.
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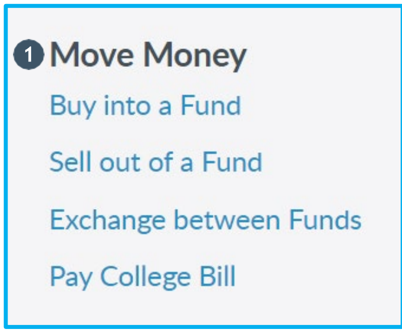

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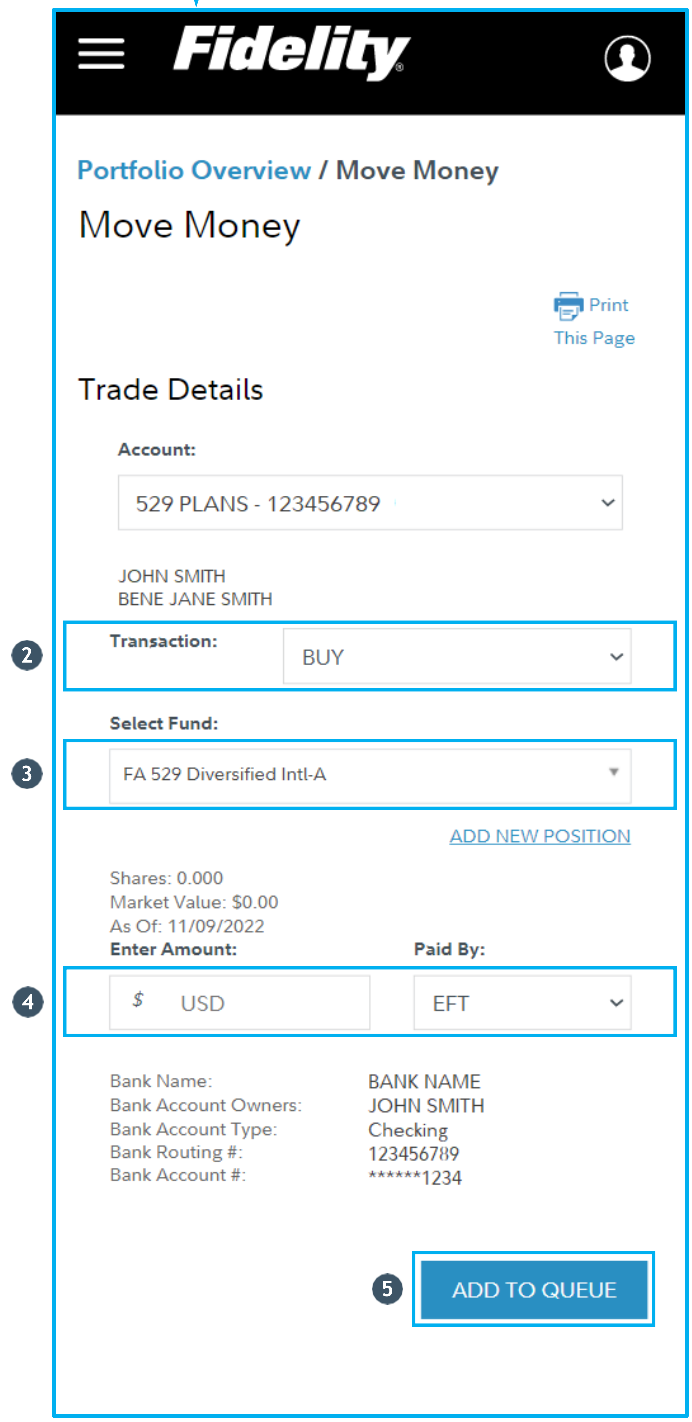

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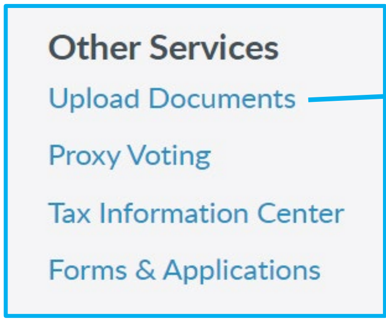

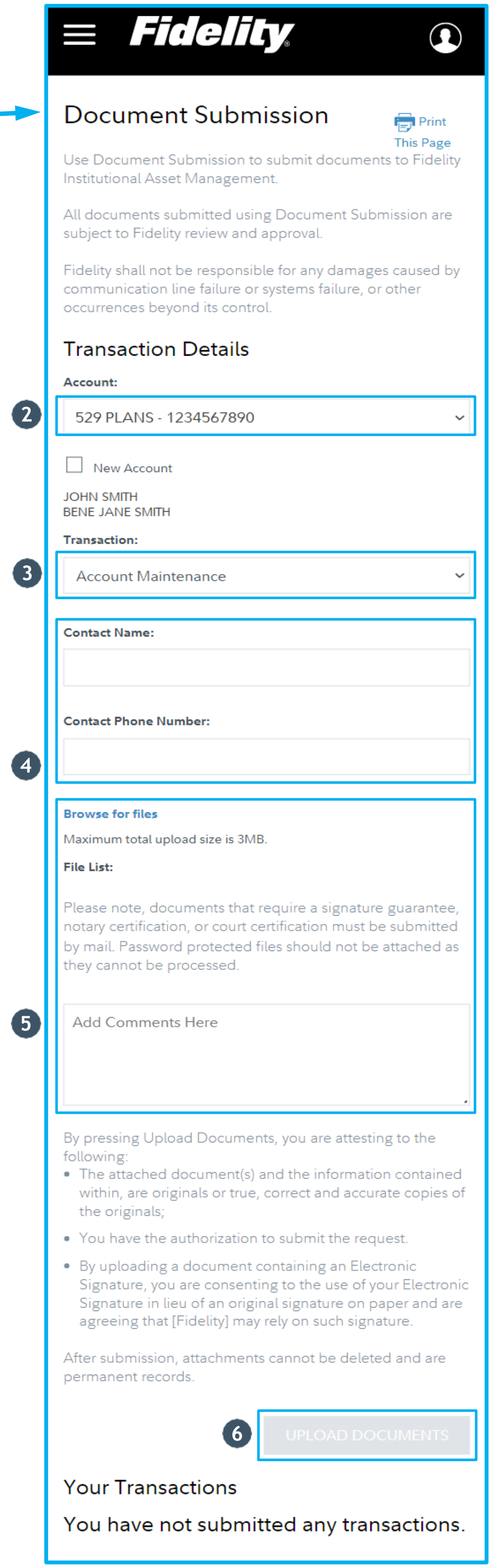

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