

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

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



CHECK UP ON YOUR FINANCES

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

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
- Follow the instructions to register
- Add your preferred email address, and select *eDelivery*



REVIEW YOUR ACCOUNT

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

- Log in to
- Click *Quick Links*
- Select *Summary*
- Review the *Contributions* tab
- Review the *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 HELPFUL RESOURCES

Discover something new on NetBenefits®:

- **Library**—Review educational articles, infographics, videos, and more
- **Planning**—Model and plan for your financial goals using the Planning & Guidance Center



GO MOBILE

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

- Monitor account balances
- Review and change investments
- Access articles, videos, and podcasts in the NetBenefits® Library

Investing involves risk, including risk of loss.

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