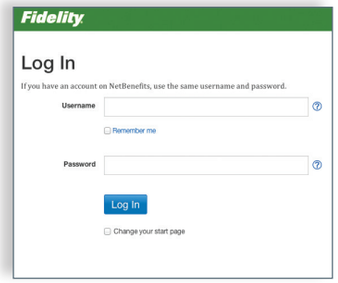
GETTING STARTED: LOG IN

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: eDelivery.

VIEW AND PRINT STATEMENTS

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

Questions?
The Fidelity.com Learning Center has dozens of videos to help you navigate the site and its contents. Visit Fidelity.com/learning-center. Contact your advisor with any questions on the accounts he or she manages.

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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 your desktop, tablet, or smartphone. 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.com/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.

CUSTOMIZE YOUR PORTFOLIO SUMMARY

Make it easier to identify each of your accounts by assigning it a nickname, organizing accounts into groups or creating custom groups. Click **Accounts & Trade,** then go to **Portfolio** and choose the **Customize** link to get started.

RESEARCH INVESTMENTS

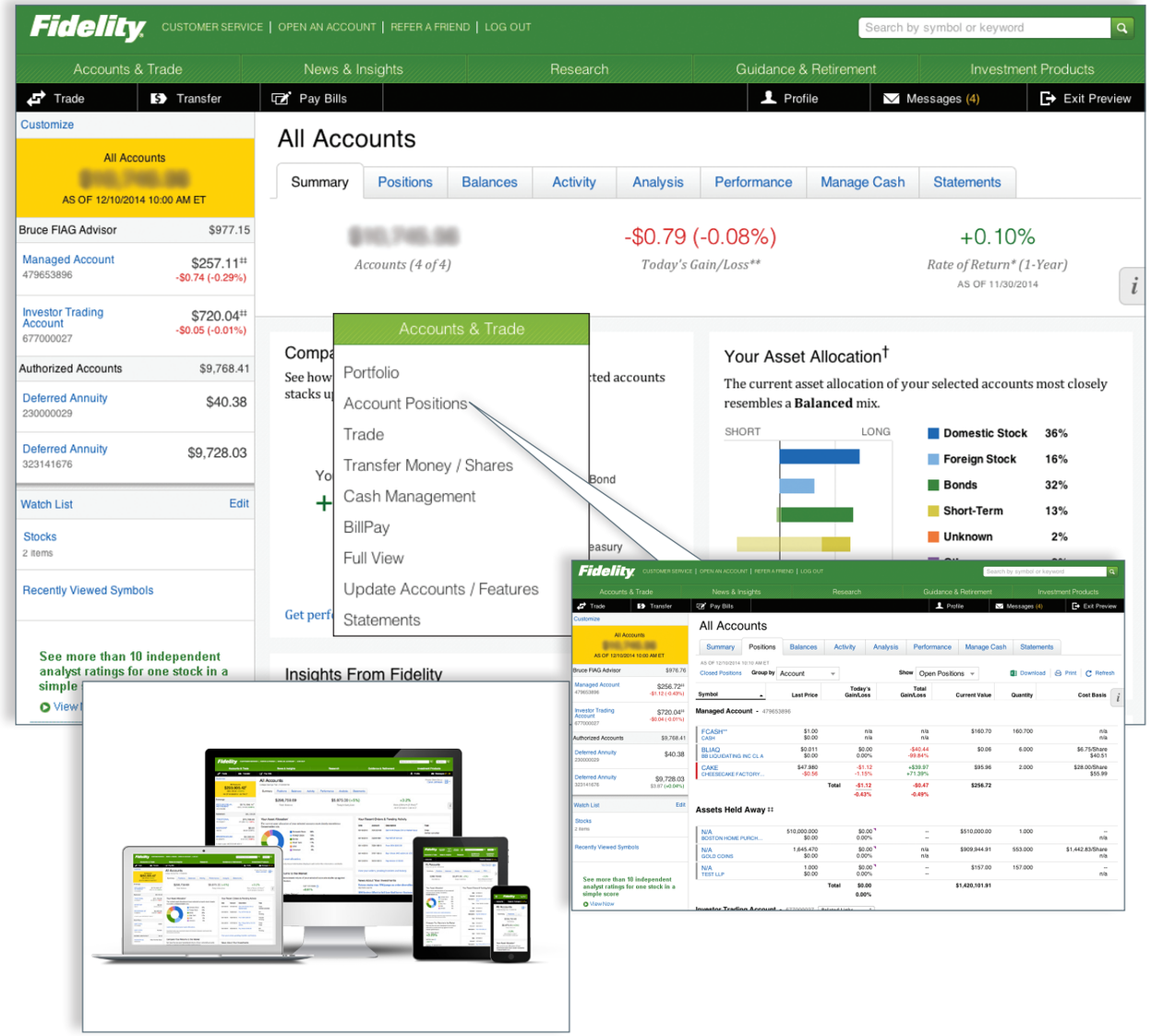
Search, analyze, and monitor investments online to stay informed and help gain insight when discussing your portfolio with your advisor. Access a large source of free, independent stock research from firms such as Morningstar and Standard & Poor's®. Click **Research** to get started.

GET 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.**

HAVE ACCESS ON THE GO

Prefer to manage your portfolio on the go? Fidelity's mobile services and apps let you access your accounts whenever—and wherever—you want. Convenient features include Mobile Check Deposit, a free service that allows for the transmission of an electronic image of a check to Fidelity using the camera in a mobile device, for deposit into an eligible Fidelity account.



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.