

Online Account Information: Easy to Access, Simple to Update

i.fidelity.com | Overview

Our website for Fidelity Advisor clients, **i.fidelity.com**, lets you access and manage your account information quickly and securely. And now, more intuitive navigation and simpler screens make it even easier to check your balances, print out statements, and update addresses, beneficiaries, and account options.

- 1 Go to **i.fidelity.com** and click on the "Individual Investors" tile on the bottom right.



- 2 Click "LOG IN TO YOUR ACCOUNT." If you already have a Username and Password, enter it now. If you are a new visitor to the site, click the "Register" tab, then the "Register Here" link and follow the steps as prompted.*

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



Fidelity Feed

Log In Register

Log In for Account Access

Username

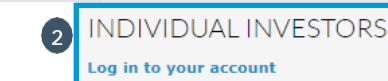
Password

[Forgot Password?](#)

LOG IN

OR

[LOG INTO DST VISION](#)



Log In **2 Register**

Register for Account Access

Financial & Institutional Professionals:
[Contact Us](#)

Individual Investors:
[Register Here](#)

Already have access?
[Log In Here](#)

- 3 You will arrive at the Portfolio page that lists the accounts in your portfolio.

Portfolio

Overview (AS OF 04/29/2020)

MARKET VALUE	MANAGE ACCOUNTS			
\$109,136.81 5 ACCOUNTS	Move Money How into a Fund Sell out of a Fund Exchange Between Funds Pay College Bill	Account Settings Mailing Address Email Information Beneficiaries Automatic Investments	Security Settings Priority Settings Change Username Change Password Security Preferences	Other Services Update Documents Proxy Voting Tax Information Center Forms & Applications

My Accounts

Account Type	Account #	Market Value	Positions	Statements	Tax Forms	
529 PLANS	00900190300	\$4,417.15	View	View	View	VIEW ALL
529 PLANS	00334051800	\$36,343.05	View	View	View	VIEW ALL
JOINT OWNERSHIP	00500175081	\$14,399.83	View	View	View	VIEW ALL

The Portfolio page lets you easily manage information on an account without sending in forms or waiting for updates to be processed.

Portfolio Print This Page

Overview (AS OF 05/06/2020)

MARKET VALUE	MANAGE ACCOUNTS			
\$108,054.39 5 Accounts	1 Move Money Buy into a Fund Sell out of a Fund Exchange between Funds Pay College Bill	2 Account Settings Mailing Address 3 Bank Information Beneficiaries 5 Automatic Investments	6 Security Settings eDelivery Settings Change Username Change Password Security Preferences	7 Other Services Upload Documents Proxy Voting Tax Information Center Forms & Applications

My Accounts

Account Type	Account #	Market Value	Positions	Statements	Tax Forms
ROTH IRA	01425395249 1	\$31,226.91	View	View 8	View 9

[VIEW ALL](#)

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.

2 Update an address

Make a modification to your address on record for the accounts associated with the linked social security number. NOTE: Updates to 529 beneficiary address 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. For your security, a 10-calendar day waiting period exists for new instructions.

4 Check your beneficiaries

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

5 Set up an automatic 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, and routinely updating your password.

7 Upload documents

Attach fax approved documents securely online directly to Fidelity.

8 Access statements or confirmations

View your most recent quarterly statement or confirmation of transaction activity.

9 Access tax forms

View, print or download your available tax forms for accounts with tax reporting. NOTE: Excludes Secondary owners, custodians of an UGMA/UTMA, Trustees with a SSN different than the Trust's EIN, or 529 Participants with beneficiary distributions.

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 **i.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?

Which account-related documents would you like eDelivered?

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

Electronic Delivery Agreement

To receive certain documents electronically rather than by U.S. mail, confirm that the eDelivery option is selected on the eDelivery Settings page and agree to the following terms and conditions by checking the consent box and selecting the "Submit" button below. You agree to stop receiving the paper mailing of the selected documents and agree to view them online at i.fidelity.com. Fidelity Investments Institutional Operations Company LLC (FIIOC) will no longer mail paper copies of the selected documents to you. Your election will also apply to any accounts, excluding custodial accounts, you establish subsequent to your election. You may request paper copies of statements and/or monetary confirmations at no charge by calling 877-208-0098.

If electronic delivery of statements is elected, you also agree to receive electronically certain statements and notices, state and federal tax related information, legislative

I have read and agree to the terms of electronic delivery as described above

In addition, you have direct access to contribute, withdraw or move investments across your accounts as you are ready.

Move Money 1
Buy into a Fund
Sell out of a Fund
Exchange between Funds
Pay College Bill

The screenshot shows a 'Trade' form with the following fields and callouts:

- Transaction:** A dropdown menu with 'BUY' selected, highlighted by callout 2.
- Account:** 01490932272
- Select Fund 3:** A dropdown menu with 'FA Biotechnology - CL C' selected. Below it is a link 'ADD NEW POSITION'.
- Enter Amount: 4:** A text input field with '\$ USD' and a dropdown menu with 'EFT' selected.
- Paid By:** A dropdown menu with 'EFT' selected.
- Bank Name:** WASHINGTON TRUST COMPANY
- Bank Account Owners:** MEL TEST SHAREHOLDER
- Bank Account Type:** Checking
- Bank Routing #:** 011500858
- Bank Account #:** *****4449
- Contribution Year:** Radio buttons for 'Prior Year' and 'Current Year', with 'Current Year' selected.
- 5:** Two buttons at the bottom: 'CANCEL' and 'PREVIEW TRADE'.

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.

4 Select payment method and amount

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

5 Preview your trade

Select PREVIEW TRADE to review and submit your trade. Choose CANCEL to make changes.

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

Other Services
Upload Documents **1**
Proxy Voting
Tax Information Center
Forms & Applications

1 Document Submission

Access the document upload feature through Other Services.

2 Account

Choose your specific account that aligns to the requested update.

3 Select the transaction type

Select the applicable transaction type from the drop down including Account Maintenance, Financial Transaction, Other, or add a new account to your portfolio by choosing New Account.

4 Enter your contact information

Include your name and phone number for any questions that may arise.

5 Attach a document

Select BROWSE to attach a 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.

Document Submission Print This Page

Use Document Submission to submit documents to Fidelity Institutional Asset Management.
All documents submitted using Document Submission are subject to Fidelity review and approval.
Fidelity shall not be responsible for any damages caused by communication line failure or systems failure, or other occurrences beyond its control.

Transaction Details **Your Transactions**

Account: JOINT OWNERSHIP - 031 **2**
You have not submitted any transactions.

New Account **3**
TEST 006
TEST 015 JT WROS

Transaction: Account Maintenance **3**

Contact Name: John Smith **4**

Contact Phone Number: 1234567890

Drop files here to attach or **browse** **5**

Maximum total upload size is 3MB.
Compatible file types include: bmp, csv, doc, docx, gif, jpg, odt, pdf, png, ppt, pptx, psd, rtf, tif, txt, xls, and xlsx. Other file types may not load properly.

File List:
Address Change John Smith.pdf - 31051

Please note, documents that require a signature guarantee, notary certification, or court certification must be submitted by mail. Password protected files should not be attached as they cannot be processed.

Add Comments Here

By pressing Upload Documents, you are attesting to the following:

- The attached document(s) and the information contained within, are originals or true, correct and accurate copies of the originals.
- You have the authorization to submit the request.
- By uploading a document containing an Electronic Signature, you are consenting to the use of your Electronic Signature in lieu of an original signature on paper and are agreeing that [Fidelity] may rely on such signature.

After submission, attachments cannot be deleted and are permanent records.

6 **UPLOAD DOCUMENTS**

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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