Things to Do and View with Fidelity–User Guide

Fidelity.com/portfolio

Now you can easily monitor all your Fidelity Investments accounts, including those your advisor manages, from your desktop, tablet, or smartphone. Fidelity.com/portfolio 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 toward your financial goals.

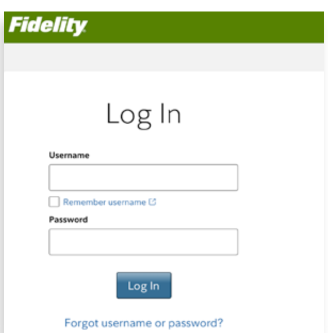
Getting Started

Log in to **Go to Fidelity.com/portfolio**. If you've never logged in to

Fidelity.com/portfolio, click **LOG IN** from the top menu bar, then select **Register Now** under **Set up online access**. You'll need to enter the last four 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 **Forgot username or password?** to reset your username or to look up your password.

Delivery preferences

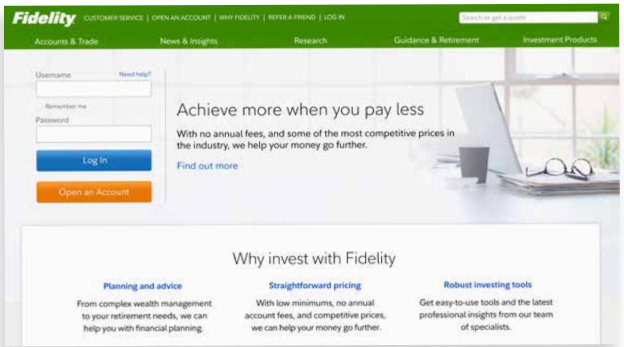
For a smart way to help save time and get organized, sign up for eDelivery of your account statements, trade confirmations, prospectuses, and shareholder reports. eDelivery allows you to receive an email notification that a document is available for viewing on Fidelity.com/portfolio. Fidelity's enhanced 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 **Documents.** On the **Documents** page, select **Delivery: eDelivery**, located on the far right and click on **Edit Delivery Preferences.**

Your current delivery preference will show at the top right of the screen. In order to edit the delivery method, click the three dots to the right of your current delivery preference.

View and Print Statements

Get up to 10 years of statements and confirmations online. Click **Accounts & Trade,** then go to **Documents.**



Fidelity Lets You Manage Your Accounts Securely—Anytime, Anywhere

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.** Click the **three dots above your balance**, then select **Customize account list** to get started.

Research your investments

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

Get tax forms and reports

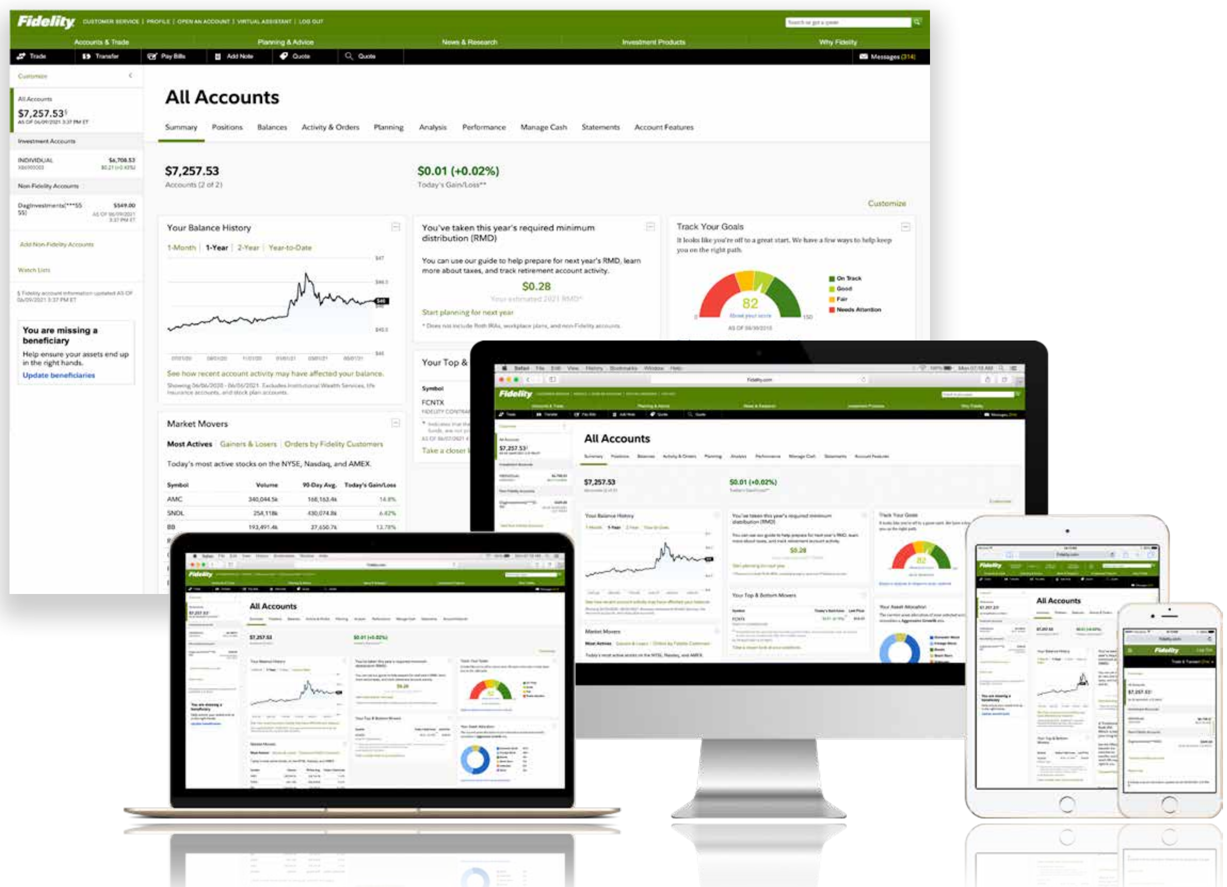
View your tax forms, reports, and confirmations online, and monitor your year-to-date tax situation. Import tax information into certain tax software. Click **Accounts & Trade,** then go to **Tax Forms & Information.**

Have access wherever you are

You can manage your portfolio anywhere. 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 give you and your advisor a complete picture of your finances, you can access everything from your investment, retirement, and bank accounts to your loans, mortgages, and credit cards at the same secure site. You can 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 **News & Research,** then go to **Alerts.** Contact your advisor with any questions.

Stay connected with the Fidelity Mobile® app.

Go to Fidelity.com/mobile

Move money

Move money electronically between your bank account and Fidelity Investments accounts. Pay bills, write checks, and enroll in direct deposit, automatic investing, and more. Click **Accounts & Trade,** then select **Transfers** for more options on depositing, withdrawing, and transferring money.

Questions?

The Fidelity.com Learning Center has dozens of videos to help you navigate the site and its contents. Visit **Fidelity.com/learning-center**. Or, contact your advisor with any questions about your accounts.

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