

Fidelity Online Enrollment Instructions



Enrolling in the Chapman University Retirement Savings Plans should only take a few minutes. Visit www.NetBenefits.com/Chapman and click **Start Now**.

Username ? Password ? Log in Remember Me Register Need Help? Security Notice

CHAPMAN UNIVERSITY Fidelity INVESTMENTS

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Get Ready for Your Future
Enroll in your workplace retirement savings plan today.
Start Now

Meet Christian Frost, your dedicated Fidelity Workplace Financial Consultant for Chapman University

First Step Learn More Enroll Today

1 Select the Plans to Enroll: Select **BOTH** Chapman University plans. Click **Enroll Now**.

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Plans & Investments

Enroll

Select both the 401(a) Plan and 403(b) Plan to complete your enrollment.

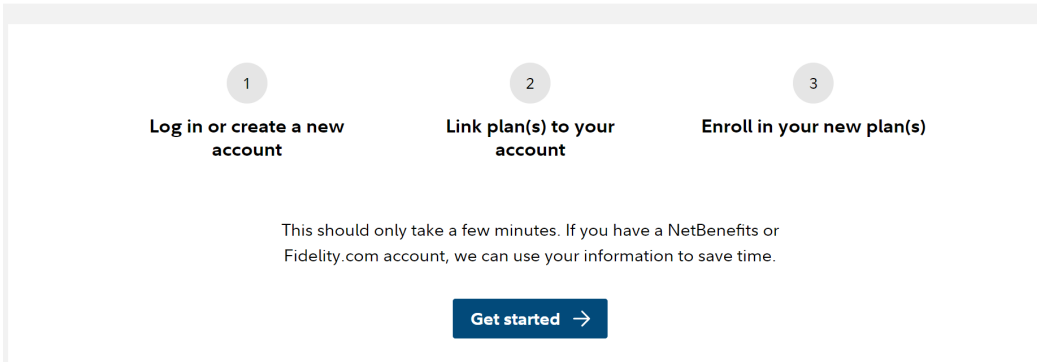
Chapman University 401(a) Plan Plan ID: 61289
 Chapman University 403(b) Plan Plan ID: 89693

Enroll Now

2 Account Opening: Select *Get Started*. If you have a prior relationship with Fidelity (Fidelity NetBenefits® or Fidelity.com account), you will be required to use your username and password to enroll in the Chapman retirement plans. If you are unsure or need to reset your password, click *Forgot Login*. If you are new to Fidelity, click *Register* as a new user to verify your identity.

1-800-343-0860

Account opening



The diagram shows a three-step process for account opening:

- 1 Log in or create a new account**
- 2 Link plan(s) to your account**
- 3 Enroll in your new plan(s)**

Below the steps, a text box states: "This should only take a few minutes. If you have a NetBenefits or Fidelity.com account, we can use your information to save time." A blue button labeled "Get started →" is positioned below the text.

CHAPMAN UNIVERSITY

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1-800-343-0860

Account opening



Log in

Enrolling in your employer's retirement plan should only take a few minutes. First, you'll need to log in to Fidelity or register as a new user.

Username

Remember Me

Password

Log In

Register as a new user

[Forgot login?](#)

[Login FAQs](#)

3 Link your new Chapman plan(s): Be sure both plans are listed. Click *Link Plan(s)*. Complete the date of hire information. You will then be brought to NetBenefits to make decisions about investments and contribution amounts.

Link plan(s) to your account

You can link up to 7 plans. Your employer provides your plan number as part of your enrollment materials, and if you need help finding your plan number, contact your benefits office.

We found the following plan(s) for you:

- CHAPMAN UNIV. 403(B) 89693
- CHAPMAN UNIV. 401(A) 61289

If you'd like to link a different plan, enter it here:

Plan number(s)

00000 + Add this plan

Link (2) Plan(s)

The screenshot shows a progress bar at the top with three steps: 'Log in' (completed with a green checkmark), 'Link plan(s)' (current step with a white circle), and 'Enroll' (pending with a grey circle). Below the progress bar is a modal dialog box titled 'Before you continue' with a close button (X) in the top right corner. The dialog asks 'When did you join your employer?' and provides a 'Date of hire' section with three dropdown menus: 'Jan', '1', and '2021'. Below these dropdowns is a blue button with a white checkmark and the text 'Finish this step'. At the bottom of the dialog, there is a 'Plan number(s)' field containing '00000' and a '+ Add this plan' link.

4 Beneficiary Designations: Once enrolled, please take a few moments today to name your beneficiaries to ensure that your benefits will be distributed according to your wishes. Click the *Profile* link then select *Beneficiaries* and follow the online instructions.

5 Complete the Salary Deferral Election Form: Final step is to complete the election form and provide it to your HR office. Click [here](#) for the form.

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- ▶ To help the government fight financial crimes, federal regulation requires Fidelity to obtain your name, date of birth, address, and a government issued ID number before opening your account, and to verify the information.
 - ▶ Contact Fidelity to obtain an Enrollment form kit, available as an alternative method to online enrollment.
 - ▶ Contact Fidelity, your employer, or your tax advisor to determine maximum allowable contribution.
 - ▶ Questions? Call Fidelity Investments at **1-800-343-0860**, Monday through Friday, from 8:00 a.m. to Midnight ET, excluding holidays that the New York Stock Exchange is closed, or visit us at www.netbenefits.com/atwork.

Investing involves risk, including risk of loss.

The Plan is intended to be a participant-directed plan as described in Section 404c of ERISA, which means that fiduciaries of the Plan are ordinarily relieved of liability for any losses that are the direct and necessary result of investment instructions given by a participant or beneficiary.

Screen Shots for Illustrative Purposes

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