



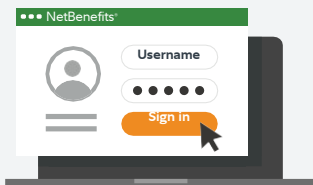
Stock Plan Services

# Opening your Fidelity Account®

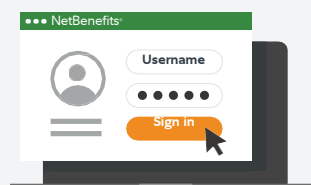
A quick-start guide for Amazon participants



Your Amazon stock plan can help you reach your financial goals—but only once you open your account. **Select your experience for instructions on opening your account.**



**1** Login Using SSO  
(pages 2-8)



**2** Login Using Your Existing Credentials  
(pages 9-11)

# Login Using SSO

On the Amazon Stock portal, under *Available brokers*, click *Select Fidelity* to initiate the process of registering your account, creating a username and password, and opening your brokerage account. If you already have an account, we will use that username and password and you will just open your brokerage account.

NOTIFICATIONS (2)

At a glance Stock awards Available brokers Stock FAQs

Select Fidelity

**Fidelity**  
INVESTMENT

ACCOUNT SERVICES

- Direct language phone support in English, Chinese (Mandarin), French, German, Italian, Japanese, Portuguese and Spanish
- Website available in 13 languages (non-US site) and English (US site)
- RSU Vest Fee \$9.95 (for sell to cover and sell all shares, for job level 5 and above)
- Online Trade Commission: \$0 per trade  
Phone Trade Commission: \$4.95 per trade
- Currency Conversion: 75-250 basis points, depending on currency

[Learn more about Fidelity](#)

Select Fidelity as your broker? X

When you select Fidelity, you'll be directed to the NetBenefits website and guided through the set up process.

**TIP:** Please take note of your Employee ID (XYZZZZZ) and your iNumber (ADASDASD) as these may be needed for setup.


Select Fidelity

Opens a new browser window.  
If you have any issues, please disable your popup blocker.

How to change or select your broker

1. Review the features offered by each broker in the Broker Feature Overview or in the Broker Comparison.
2. Select the "Learn more about..." link under each broker card to get more detailed information about each broker.
3. On Amazon Stock, make your choice by choosing the "Select Fidelity" or "Select Morgan Stanley" button
4. Review the pop-up window that outlines the information your chosen broker requires to create an account
5. Select "Yes, create account at Fidelity" or "Yes, create account at Morgan Stanley" to initiate the account create process at your selected broker

Note: If you change brokers, previously vested shares are not automatically transferred to the new broker.



## Let's get started

Thanks for choosing Fidelity. Here's what you need to do next.

- 1. Register for Fidelity NetBenefits®** (5 minutes)  
View and manage all your Amazon awards in one place.
- 2. Set up your Fidelity brokerage account** (5 minutes)  
You'll need a brokerage account to hold your Amazon shares. If you already have a Fidelity brokerage account, we'll use that.

**Get started** →

Need help? Call us at [800-544-9354](tel:800-544-9354).

[Show important information](#)

When you *Select Fidelity*, you will be brought to our *Let's get started* page. You will be required to register on Fidelity NetBenefits® and open your brokerage account. Click *Get Started*.

**Fidelity  
NetBenefits®**

## Register now

### Create a username

Username

- ✗ Use 8 to 15 letters and/or numbers
- ✓ If your username is between 9 and 11 characters in length, it must contain at least two letters
- ✓ No symbols, punctuation marks, or spaces (e.g., #, @, /, \*, -)
- ✓ No sequences (e.g., 12345 or 111)

[See more guidelines](#)

### Create a password

Password

Password strength: **Weak**  
Letters are case-sensitive.

- ✗ Special characters except for # & \* < > [ ] ' !
- ✗ At least one number
- ✗ 6 - 20 characters
- ✗ Upper and lower case letters
- ✓ No sequences (e.g., 12345 or 111)


[See more guidelines](#)

Re-type new password

[Cancel](#) **Continue**

[Need help?](#)

Create a username and password, then click *Continue*.



### Contact information


Please provide us with your personal contact information below.

You can always update your contact information on your Profile page once you log in.

Personal email

Phone number

Phone type

Mobile 

**eDelivery**

You will be automatically enrolled in eDelivery for required communications as well as service and educational materials. You may change these preferences at any time by going to NetBenefits Profile/Communications

[Cancel](#) [Continue](#)

[FAQ](#) | [Security Terms](#)

Fill in your contact information, and then select *Continue*.






### You have successfully registered

Your new username is: **testuser250**


[Log in](#)

You will see a confirmation of successful registration. Be sure to save your username for future reference.

Click *Log in* to now set up your brokerage account. This is where your vested Amazon stock will be deposited.

Select brokerLog in or registerSet up your account



### Let's set up your Fidelity brokerage account

We'll deposit your Amazon shares here when they vest. You can use this account to buy and sell other investments too. [Learn more about Fidelity brokerage accounts](#)

If you already have an individual Fidelity brokerage account, we'll use that. (On the next page, you may need to log in using your NetBenefits username and password.)

[Exit](#) [Continue](#)

Need help? Call us at [800-544-9354](#).

[Show important information](#)

You will now be required to open your brokerage account. Click *Continue* to start the process of opening your account.

[About You](#) > [Your Account](#) > [Confirm](#) > [Next Steps](#)

## Personal Information

In accordance with federal law, Fidelity Investments must obtain certain information to use in verifying your identity prior to opening your account.

All fields required unless otherwise noted.

**Personal Information**

Your Name

Social Security Number

Date of Birth

Are you a U.S. Citizen? ☒ Yes ☐ No

Phone  -  -

Email

**Legal/Residential Address**

Address Line 1

Address Line 2 (optional)

City

State

ZIP Code

Is the Mailing Address the Same As the Legal Address? ☒ Yes ☐ No

[Exit](#) [Next](#)

**Questions?**  
800-544-9354  
[Chat with a Representative.](#)

Review and complete the *Personal Information* in the *About You* section and click *Next*.

### Do you need to update your Amazon Employee Address?

If your address on NetBenefits.com is not accurate, active Amazon employees can change their address easily through PeoplePortal. In PeoplePortal, click the *Personal Information* link to update your address. A to Z users can click the *Profile* button to update their address: updates will automatically carry over in 3–5 business days when Amazon sends updated address data to Fidelity.

**Active Whole Foods Market Team Members can change their address in Workday.**

[About You](#) > [Your Account](#) > [Confirm](#) > [Next Steps](#)

## Employment Information

Investment industry regulations require that we obtain your employment information.

All fields required unless otherwise noted.

**Employment Status**

Employment Status

**Associations**

Are you, or an immediate family member residing in the same household, employed by or associated with any of the following: a broker-dealer, stock exchange, exchange member firm, the Financial Industry Regulatory Authority (FINRA), a municipal securities dealer, or other financial institution? [?](#)

☐ Yes ☐ No

Are you or an immediate family/household member, a director, corporate officer, or 10% shareholder of a publicly held company? [?](#)

☐ Yes ☐ No

[Save & Finish Later](#) [Previous](#) [Next](#)

**Questions?**  
800-544-9354  
[Chat with a Representative.](#)

Select your *Employment Status*, confirm your *Associations* status, and click *Next*.

About You > Your Account > Confirm > Next Steps

## Employment Information

Investment industry regulations require that we obtain your employment information.

All fields required unless otherwise noted.

**Employment Status**

Employment Status

**Employer Information**

Your Occupation

Employer's Name

Address Line 1

Address Line 2 (optional)

City

State

ZIP Code

**Associations**

Are you, or an immediate family member residing in the same household, employed by or associated with any of the following: a broker-dealer, stock exchange, exchange member firm, the Financial Industry Regulatory Authority (FINRA), a municipal securities dealer, or other financial institution? ⓘ

Are you or an immediate family/household member, a director, corporate officer, or 10% shareholder of a publicly held company? ⓘ

[Save & Finish Later](#)

**Questions?**  
800-544-9354  
[Chat with a Representative.](#)

## Employment Information

Regulations require that Fidelity obtains your employment information.

## Associations

Please be aware that most individuals typically answer No to both associations questions; however, if either of the two bullets below do apply to you, you must answer Yes.

- Are you employed by or associated with a broker-dealer, stock exchange, exchange member firm, Financial Industry Regulatory Authority (FINRA), or a municipal securities dealer?
- Are you or an immediate family/household member, a director, corporate officer, or 10% shareholder of a publicly held company?

Click *Next*.

✓ About You > Your Account > Confirm > Next Steps

## Account Settings

All fields required unless otherwise noted.

**Core Position**

Your core position is where the money in your account is held until you invest it. Money deposited in the account will be held in an interest-bearing cash position. You may be able to change your election after your account is open. For more information, contact Fidelity.

**Email Preferences**

Receive financial documents electronically?

eDelivery® sends account statements, trade confirmations and related prospectuses, tax forms<sup>2</sup> with related disclosures, as well as prospectuses, shareholder reports, and other disclosures to you electronically. To receive these documents by mail, select No.

[Save & Finish Later](#)

**Questions?**  
800-544-9354  
[Chat with a Representative.](#)

**Core Position** Your core position is where the money in your account is held until you invest it. When you open your account, the default core position is FCASH. You may be able to change your election once your account is open.

**Email Preferences** By leaving the default option of Yes, you are agreeing to receive account statements, trade confirmations and related prospectuses, and tax forms with related disclosures, as well as prospectuses, shareholder reports, and other disclosures, electronically.

Click *Next*.

✓ About You > ✓ Your Account > **Confirm** > Next Steps

## Review and Confirm

Please review each section carefully and make changes using the Edit links.

**Account Information**

Registration: Stock Plan Services Account

**Personal Information** | [Edit](#)

Account Owner: FIRSTNAME LASTNAME  
XXX-XX-XXXX  
XXXXX19XX

Contact: 333-333-4444  
CORRECTEMAIL@AMAZON.COM

Country of Citizenship: UNITED STATES  
Country of Tax Residence: UNITED STATES

Legal/Residential Address: CORRECT ADDRESS  
ANYTOWN, TX ZZZZZ

Mailing Address: CORRECT ADDRESS  
ANYTOWN, TX ZZZZZ

**Employment Information** | [Edit](#)

Employment Status: Employed  
Correct Occupation

Employer Information: Amazon  
410 Terry Ave N  
Seattle, WA 98109

Associated Company: No  
Information

Corporate Control Status: No

**Account Settings** | [Edit](#)

Core Position: Fidelity® Interest-Bearing Option (FCASH)

eDelivery: Enrolled

[Save & Finish Later](#) [Previous](#) [Confirm My Information](#)

**Questions?**  
800-544-9354  
[Chat with a Representative](#)

You will then *Review and Confirm* your information is correct or make any necessary edits here, and then click *Confirm My Information*.

✓ About You > ✓ Your Account > **Confirm** > Next Steps

## Agree to Terms

Open, read, and save each of the documents below.

[Customer Agreement \(PDF\)](#) | [Read the full document](#)

[Terms & Conditions \(PDF\)](#) | [Read the full document](#)

[Trusted Contact \(PDF\)](#) | [Read the full document](#)

[Householding of Shareholder Documents \(PDF\)](#) | [Read the full document](#)

[Electronic Delivery Agreement \(PDF\)](#) | [Read the full document](#)

In this application, "you" refers to all account owners. If you are unable to view or access these documents, please call this application. You may obtain paper copies of this application or any of these documents listed above at any time at no charge by calling 800-544-9354. You can also find the preceding documents at Customer Service > Forms & Applications.

Do you agree to the electronic delivery of the above documents?

☒ Yes ☐ No

**Certify your taxpayer identification number.**

Under penalties of perjury, you certify that:

- The Social Security number or taxpayer identification number you have provided is correct (or you are waiting for a number to be issued to you); and
- Unless you have checked the box immediately below these certifications, you are not subject to backup withholding because:
  - you are exempt from backup withholding; or
  - you have not been notified by the Internal Revenue Service (IRS) that you are subject to backup withholding as a result of failure to report all interest or dividends; or
  - the IRS has notified you that you are no longer subject to backup withholding.
- I am a U.S. citizen or other U.S. person as defined in the IRS Form W-9 instructions; and
- The FATCA code(s) you have provided (if any) indicating that I am exempt from FATCA reporting is correct.

☐ You must check this box if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

**By selecting Open Account below, you acknowledge that you:**

- Are the person named in this account application;
- Have been provided with the above documents electronically and do not need a paper copy;
- Have read and understood, and agree to be bound by the above documents, which set forth the terms and conditions of this account, as they are currently in effect and as they may be amended in the future, including but not limited to the Fidelity Account® Customer Agreement and related documents, Terms and Conditions, consent to Householding of Shareholder Documents, Electronic Delivery Agreement and other applicable notices, disclosures and documents (collectively, the "Agreement");
- Will electronically sign this application by selecting Open Account.

This account is governed by a [pre-dispute arbitration clause](#) which is part of the Fidelity Customer Agreement and which is accessible by selecting the preceding link. By selecting Open Account, you acknowledge receipt of the pre-dispute arbitration clause.

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

[Save & Finish Later](#) [Previous](#) [Open Account](#)

**Questions?**  
800-544-9354  
[Chat with a Representative](#)

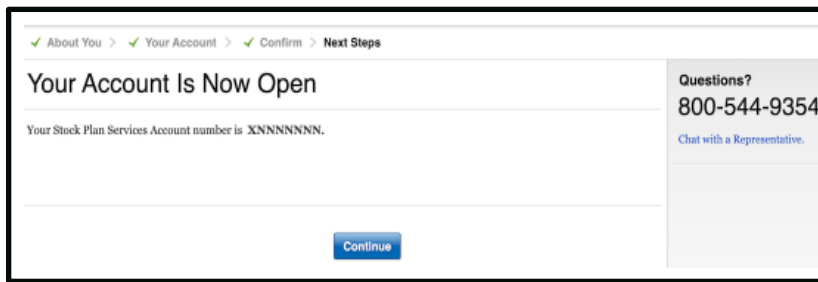
## Agree to Terms

Review the Customer Agreement and other documents.

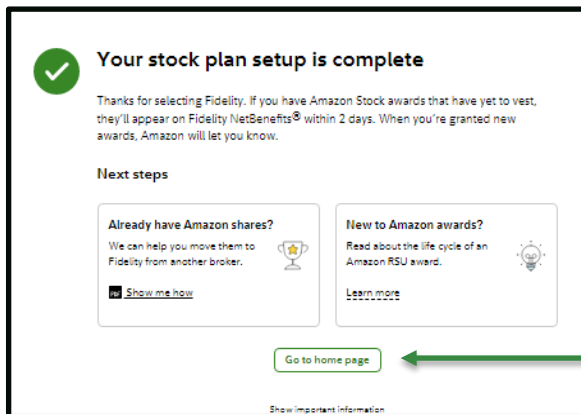
Select Yes to agree to electronic delivery of the documents.

**IMPORTANT:** Most individuals do not check this box. Click here only if you've been informed by the IRS that you're subject to backup withholding.

Once read, click *Open Account*.



You will receive confirmation that your account is open, select *Continue*.



You will receive confirmation that your plan setup is complete and can now go to the homepage.

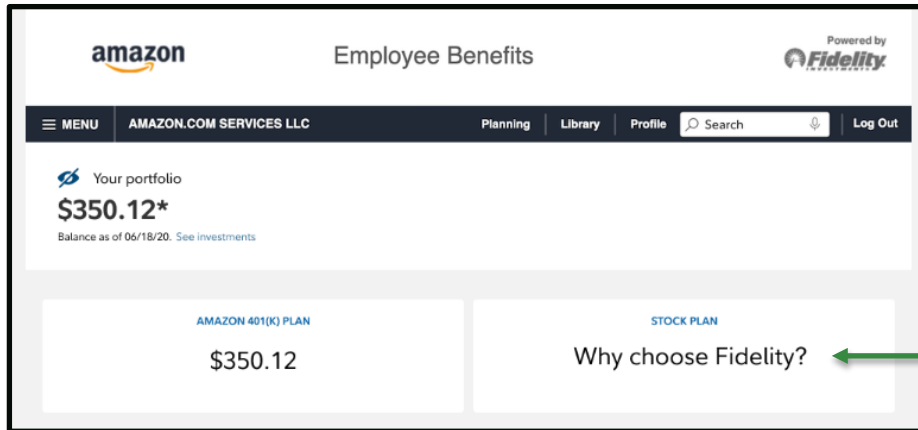
Note, if you established your brokerage account with your existing account, you will still need to select Fidelity on the [\*Amazon Stock Portal\*](#).

If your account opening is not successful, you will see an online message notifying you that your application is under review. Please check back any time after five business days to see if it is complete. Fidelity will contact you if additional information is needed.

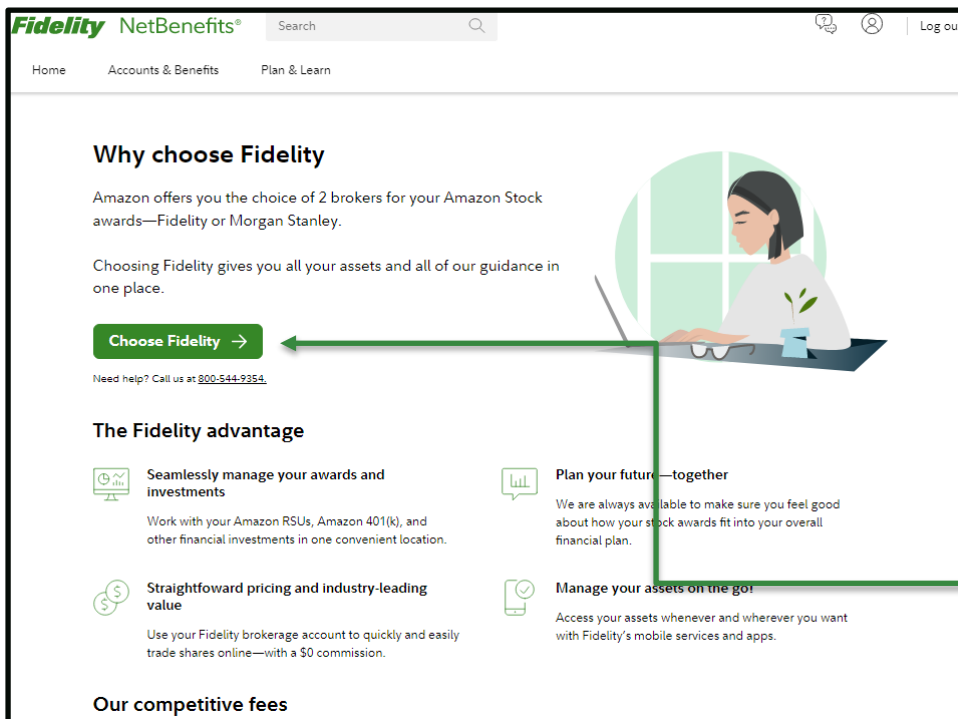


# Login Using Your Existing Credentials

If you have already registered on Fidelity NetBenefits® log in to [NetBenefits.com](https://netbenefits.com).




Once logged in select *Why choose Fidelity?*



On the *Why choose Fidelity?* page you will learn about Fidelity and the advantage of selecting Fidelity as your broker.

If you decide that Fidelity is the broker for you, select *Choose Fidelity.*



## Let's get started

Thanks for choosing Fidelity. Here's what you need to do next.


- 1. Set up your Fidelity brokerage account** (5 minutes)  
You'll need a brokerage account to hold your Amazon shares. If you already have a Fidelity brokerage account, we'll use that.
- 2. Confirm Fidelity as your broker** (5 minutes)  
You'll do this on the Amazon Stock portal.

[Back](#) [Get started →](#)

Need help? Call us at [800-544-9354](tel:800-544-9354).

[Show important information](#)

Follow the instructions on the *Let's get started* page.



Log in or register Set up your account Select broker

## Let's set up your Fidelity brokerage account

We'll deposit your Amazon shares here when they vest. You can use this account to buy and sell other investments too. [Learn more about Fidelity brokerage accounts](#)


If you already have an individual Fidelity brokerage account, we'll use that.

[Exit](#) [Continue](#)

Need help? Call us at [800-544-9354](tel:800-544-9354).

[Show important information](#)

First you will set up your brokerage account. Select *Continue* to establish your account. **If you need to set up a brokerage account, click [here](#) to the steps for establishing your account.**



Log in or register Set up your account Select broker

## We've linked your awards to account X12343

You already have a brokerage account at Fidelity, so we'll deposit your Amazon shares there when they vest.

If you would prefer to link your Amazon award to a new or different account, please call us at [800-544-9354](tel:800-544-9354).

[Exit](#) [Continue](#)

Need help? Call us at [800-544-9354](tel:800-544-9354).

[Show important information](#)

**If you already have an existing individual brokerage account at Fidelity, that account will be linked to your awards. Select *Continue* to identify Fidelity as your broker.**

Log in or register Set up your account Select broker

## Confirm Fidelity on the Amazon Stock portal

Go to the Amazon Stock portal and confirm that you want Fidelity to manage your Amazon Stock awards. Use one of the following methods to go to the portal.

✓ **You're an Amazon employee**

Logged in to the Amazon network?  
Visit the Amazon Stock portal and select Fidelity (under Available Brokers).  
[Go to the Amazon Stock portal](#)

Not logged in to the Amazon network?  
Visit the Benefits section of the A to Z website to locate the Amazon Stock portal. From the Amazon Stock portal, select Fidelity (under Available Brokers).  
[Go to Amazon A to Z](#)

✓ **You're a Whole Foods Market employee**

Access the Amazon Stock portal through MyApps while on the Whole Foods Market network or VPN. From the Amazon Stock portal, select Fidelity (under Available Brokers).  
[Go to MyApps](#)

[I'll do this later](#)

Need help? Call us at 800-544-9354

Lastly, you will need to confirm Fidelity as your broker choice on the Amazon Stock portal. Click on the drop down based off your employee status and follow the instructions.

**IMPORTANT:** If you do not complete this confirmation step on the Amazon stock portal, your broker will NOT be Fidelity.

Once you have confirmed Fidelity as your broker you can login to NetBenefits and view your award information.

If you have any questions, please contact a Fidelity Stock Plan Services representative at **800-544-9354**.

## Investing involves risk, including risk of loss.

All screenshots within are for illustrative purposes

Be sure to open your account. If you don't, you may be subject to additional U.S. IRS-mandated tax withholding on certain transactions.

See your plan documents for details regarding the terms and conditions of your plan.

Please refer to the Fidelity Stock Plan Services section of the Fidelity® Account Customer Agreement for terms related to the operation and maintenance of your account, including address changes.

Amazon, Whole Foods, Morgan Stanley, and Fidelity Investments are not affiliated.

Fidelity Stock Plan Services, LLC, provides recordkeeping and/or administrative services to your company's equity compensation plan, in addition to any services provided directly to the plan by your company or its service providers.

NetBenefits and the Fidelity Investments and pyramid design logo are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

© 2023 FMR LLC. All rights reserved.

1071163.1.1