Stock Plan Services

Way to go.
You’ve earned an equity award from your company.

Your award at a glance: Stock Options.
Congratulations on being recognized for all the work you do. Stock options can help you build your personal wealth and make it easier to reach your financial goals.

Below are some general steps that could occur during the lifecycle of your award. Be sure to check your own plan rules for details about your specific award.

1. Receive your award and open your account (if needed).

2. Accept your award
   If it’s required by your company.

3. Your award is vested
   You’ve met all company requirements, including the waiting or "vesting" period.

4. Decide if and when to exercise your options
   You have until the expiration date to take action.

5. Exercise your options
   The exercise method used will determine whether you receive shares or cash.

6. View your shares or cash
   Log in to your account at Fidelity.com to see what you received (minus taxes).

7. Manage your account
   Hold or sell your shares and manage your cash at Fidelity.com.

Consider these smart next steps to make things easier later on.

Link your Fidelity Account® to your bank account to quickly transfer cash between them.

Bookmark the Stock Plan Services Resource Center at Fidelity.com/SPSResourceCenter for ongoing help with everything from selling shares to paying taxes.

Investing involves risk, including risk of loss.
See your plan documents for details regarding the terms and conditions of your plan.
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.
Your company and Fidelity Stock Plan Services are not affiliated.
Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.
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.
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