Opening your Fidelity Account®
A quick-start guide for stock plan participants

Your company stock plan can be an important benefit for you — but only if you open your account. Just follow these easy steps.

Create Your Password
Before you can open your Fidelity Account®, you must ensure that you have a password to access your information. If you have an existing individual brokerage account with Fidelity or if you already have a Fidelity NetBenefits® password for other benefit programs, you do not need to create a new password — you will have the convenience of accessing all your information with the same password.

Step 1  • Navigate to NetBenefits.com.

Step 2  • Establish your username and password by clicking Register as a new user.

Step 3  • Complete the information requested to verify your identity: your first and last name, date of birth, and the last four digits of your Social Security number.
  • Click Submit.

Step 4  • Create a new username.
  • Create your password. You can enter your current password, if you have created it previously. Otherwise, use the following criteria to create your password:
    – 6 to 12 letters and/or numbers
    – No sequences (e.g., 1234) or a single repeating number or letter
    – Do not use your Social Security number, username, or date of birth

Step 5  • You have successfully created your password and username. You may now log in to NetBenefits.com to open your Fidelity Account.
1. Once logged in to your Fidelity Account®, click Open Account to start the activation process.

2. You’ve launched the application for your new Fidelity Account. Fill in all the required Personal Information. Then click Next.

Note: Portions of the account owner information may be prefilled based on information provided by your employer.
3. **Complete the Employment Information.**
   
   Select Yes or No to questions regarding your associations. Then click *Next*.

4. **Select your Email Preferences** under *Account Settings* and click *Next*.

5. **Review and confirm** your information.
   
   If anything’s incorrect, click *Edit* to make changes.
   
   When everything is correct, click *Confirm My Information*.
6. **Agree to Terms.** Review the Customer Agreement and other documents.

Select Yes if you agree to electronic delivery of the documents.

**IMPORTANT:** Only click here if you’ve been informed by the IRS that you’re subject to backup withholding.

Click I Agree to agree to the Terms.

7. When you reach this point, you have successfully opened your Fidelity Account and are ready to take advantage of all the benefits your stock plan has to offer.

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

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.

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.