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 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.
  • By default, your username is your Social Security number (SSN). For security reasons, we recommend that you change your username. Click button to create username to complete.
  • 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
  • Create a security question and answer, and provide your email address. Click Submit.

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.**

*Screenshot is for illustrative purposes only.*