

Stock Plan Services

Setting up your restricted stock tax withholding—A quick-start guide



Tax withholding is money your company holds back from your award that's paid toward your taxes.

Follow these easy steps to set up your restricted stock tax withholding.





Log in to your account or **register** as a new user.



2 Select your stock plan

Next, open the **distribution** or **vesting** details for your award.



Set up your tax election

For any unvested shares, click **Tax withholding** and choose the method you want to set up your tax election.





Make your tax withholding election. If you choose to **Deposit funds**, you must have enough cash in your Fidelity Account® to cover the tax obligation.



Make your selection

Choose the eligible awards to apply your tax withholding method. You can select any or all eligible awards.



6 Confirm tax withholding selection

Click **Next** to generate a confirmation of your tax withholding selection and a confirmation number.

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

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.

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.

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