

# GETTING STARTED WITH YOUR NEW FIDELITY ACCOUNT

Welcome to Fidelity! Here's a simple checklist to help you make the most of your new Fidelity account.



## SET UP YOUR NETBENEFITS® ACCOUNT

NetBenefits is the site where you can manage your workplace savings account. If you already have Fidelity accounts, you can use your login information to access NetBenefits. If you need to set up a username and password:

- Visit [NetBenefits.com](https://netbenefits.com)
- Click *Register as a new user*
- Follow the instructions
- Add your preferred email address, and select *eDelivery*



## REVIEW YOUR ACCOUNT

Once your NetBenefits account is set up, review your account balances, contribution percentage, and investments.

- Log in to [NetBenefits.com](https://netbenefits.com)
- Click *Quick Links*
- Select *Summary*
- Review the *Contributions* tab
- Review the *Investments* tab



## UPDATE YOUR BENEFICIARY INFORMATION

Ensure that your beneficiaries are set up the way you want, especially if you haven't reviewed them in a while.

Here's how:

- Log in to [NetBenefits.com](https://netbenefits.com)
- Click *Profile*
- Select *Beneficiaries* and follow the instructions



## TAKE ADVANTAGE OF RESOURCES

Discover something new on NetBenefits:

- **Library**—Review educational articles, infographics, videos, and more
- **Planning**—Model and plan for your financial goals using the Planning & Guidance Center



## GO MOBILE

Download the NetBenefits mobile app from your favorite app source, and access your workplace accounts anytime, anywhere. With the mobile app, you can:

- Monitor account balances
- Review and change investments
- Access articles, videos, and podcasts in the NetBenefits Library



## REVIEW YOUR FINANCES

Use this opportunity to review all your savings and investing accounts to ensure that your investments are aligned with your financial goals.

Investing involves risk, including risk of loss.

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