Top things to view and do with Fidelity

User Guide

Fidelity.com/portfolio

The Fidelity.com/portfolio Advantage

Now you can easily monitor all your Fidelity Investments accounts, including those your advisor manages, from your desktop, tablet, or smartphone. Fidelity.com/portfolio is designed to provide you with the information and resources you need, virtually 24 hours a day, to help you work more effectively with your advisor toward your financial goals.

Stay connected with the Fidelity Mobile® app.
Go to Fidelity.com/mobile

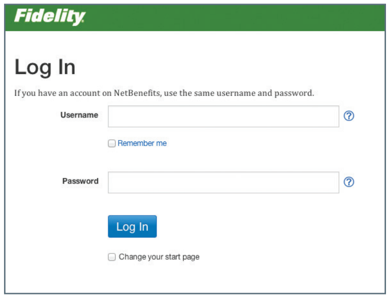
Getting started: Log in

Go to Fidelity.com/portfolio.

If you've never logged in to Fidelity.com/portfolio, click LOG IN from the top menu bar, then select **Register Now** under **New User.** You'll need to enter the last four digits of your Social Security number, and your first name, last name, and date of birth, to complete your online registration and create a username and password.

To view and monitor your accounts online, simply log in:

1. Enter your **username.**
2. Enter your **password.**
3. Click **Log In.**



Need Help Logging In?

From the Log In page, click **Having trouble with your username or password?** to reset your username or to look up your password.

Delivery preferences

For a smart way to help save time and get organized, sign up for eDelivery of your account statements, trade confirmations, prospectuses, and shareholder reports. eDelivery allows you to receive an email notification that a document is available for viewing on Fidelity.com/portfolio. Fidelity's enhanced eDelivery is safe, secure, and easy to use, and allows you to control delivery preferences for documents related to your accounts. To select eDelivery, click **Accounts & Trade,** then go to **Statements.** Under Account Settings, click **Edit** to the right of Delivery Preferences: eDelivery.

View and print statements

Get up to 24 months of statements and confirmations online. Click **Accounts & Trade,** then go to **Statements.**

Monitor your accounts online

View your balances, holdings, and transactions on all your Fidelity Investments accounts, including those you manage with your advisor. Click **Accounts & Trade,** then go to **Portfolio** to get started.

Customize your portfolio summary

Make it easier to identify each of your accounts by assigning it a nickname, organizing accounts into groups, or creating custom groups. Click **Accounts & Trade,** then go to **Portfolio** and choose the **Customize** button to get started.

Fidelity lets you manage your accounts securely—anytime, anywhere.

Research your investments

Search, analyze, and monitor investments online to stay informed and updated when discussing your portfolio with your advisor. Access a large reservoir of free, independent stock research from firms such as Morningstar and Standard & Poor's®. Click **Research** to get started.

Get tax forms and reports

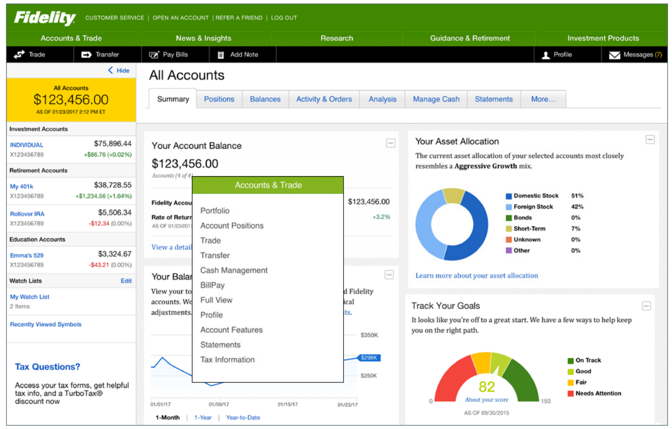
View your tax forms, reports, and confirmations online, and monitor your year-to-date tax situation. Import tax information into certain tax software. Click **Accounts & Trade,** then go to **Statements.**

Have access wherever you are

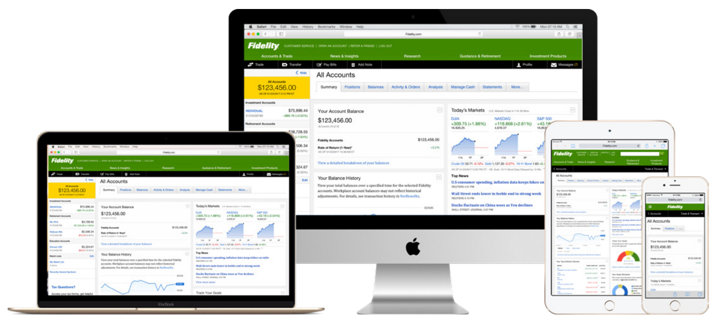
You can manage your portfolio anywhere. Fidelity's mobile services and apps let you access your accounts whenever—and wherever—you want. Convenient features include Mobile Check Deposit, a free service that allows for the transmission of an electronic image of a check to Fidelity (using the camera in a mobile device), for deposit into an eligible Fidelity account.

View all your accounts

To give you and your advisor a complete picture of your finances, you can access everything from your investment, retirement,



For illustrative purposes only



and bank accounts to your loans, mortgages, and credit cards at the same secure site. You can also enjoy reward programs, email, and online calendars. Click **Accounts & Trade,** then go to **Full View®.**

Get automatic updates and reminders

Follow your investments by setting up account alerts with Fidelity. Alerts enable you to:

- Monitor activity and trading in your accounts.
- Track the price of a particular security.
- Receive account balances and positions.
- Be notified of stock, bond, and mutual fund events.
- Subscribe to market commentaries and reports.

Click **Research,** then go to **Alerts.** Contact your advisor with any questions.

Move money

Move money electronically between your bank account and Fidelity Investments accounts. Pay bills, write checks, and enroll in direct deposit, automatic investing, and more. Click **Accounts & Trade,** then select **Transfer** from the black bar for more options on depositing, withdrawing, and transferring money.

Quick Guide

Setting up Electronic Delivery

To Set Up Electronic Delivery of Fidelity Statements, Trade Confirmations, Prospectuses and Reports:

Go to www.Fidelity.com

1 Login

2 From the top menu select "Your Profile" tab, then click "Preferences" (Below Profile to the right).

3 Under Communication Options in the electronic/paper mail delivery section click "Update".

4 Click "Update Delivery Options".

5 Select "E-Mail Delivery" in each box on the page and then click "Next".

6 Read the Agreement, scroll to the bottom of the page. If you agree with the Terms of the agreement click "I Agree".

7 The delivery confirmation screen will verify that your changes were successful.

To Make Changes to your Preferences, Login to Fidelity.com and follow the above steps to change your settings

Questions?

The Fidelity.com Learning Center has dozens of videos to help you navigate the site and its contents. Visit **Fidelity.com/learning-center**. Or, contact your advisor with any questions about your accounts that he or she manages.

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