

# Getting started with your new Fidelity account

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

## STEPS TO TAKE NOW

### Review new account materials

**You'll be receiving helpful materials outlining your plan's move to Fidelity.**

- ✓ Review your current account balance and investments
- ✓ Understand key dates and important plan changes

### Check up on your finances

**Use this opportunity to assess your current and future financial goals.**

- ✓ Review all your savings and investing accounts
- ✓ Align your saving and spending habits to support your plans for the future

## STEPS TO TAKE WHEN YOUR PLAN IS AT FIDELITY

### 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
- ✓ Follow the instructions to register
- ✓ Add your preferred email address and mobile number

### Review your account

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

- ✓ Log in to NetBenefits.com
- ✓ Select *Accounts & Benefits* from the top navigation bar
- ✓ Review the *Manage contributions* tab
- ✓ Review the *Manage investments* tab

### Update your beneficiary designations

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

### Take advantage of resources

**Discover something new on NetBenefits®:**

- ✓ **Learn**—Review educational articles, infographics, videos, and more
- ✓ **Planning**—Model and plan for your financial goals using the online tools

### Go mobile

**Download the NetBenefits® mobile app from your favorite app source, and manage your workplace benefits anytime, anywhere. With the mobile app, you can:**

- ✓ Securely log in and check your balance
- ✓ Receive notifications on security and transaction status
- ✓ Easily monitor your plan and goals