

Turn hereSM



Guide to Online Enrollment with Fidelity Investments

- Screenshot 1:** To get started, please visit <http://enrollonline.fidelity.com/> with your Plan ID number (89274) and Social Security Number
- Screenshot 2:** Enter your Account Setup information.
- Screenshot 3:** After reviewing & submitting your information, you will log in to Fidelity NetBenefits[®] (www.fidelity.com/atwork) to start enrolling.
- Screenshot 4:** For security purposes, before logging in to NetBenefits, you will set up a Personal Identification Number (PIN). You can create a Customer ID to use with your PIN, or you may use your Social Security number. If you have other Fidelity accounts, you can use your existing PIN.
- Screenshot 5:** Once your PIN is confirmed, you will return to NetBenefits and log in. Follow the prompts to complete the enrollment process.

Welcome to Enrollment for Your Employer's Retirement Plan.

These are the sections of Enrollment you will go through.

To enroll, you will:

- Enter information to set up your account
- Set up a Personal Identification Number (PIN) to use to log in to NetBenefits. If you have another Fidelity account and PIN, you can use the same PIN.
- Enroll in your plan

Please start by entering your Plan ID and Social Security Number (SSN).

This online application is only intended for use by U.S. citizens and U.S. resident aliens. If you are a non-resident alien, or a U.S. citizen with a foreign address, please call a representative to complete a paper application.

Enter Your Identification

Plan ID [Where do I get my Plan ID?](#)

SSN

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Account Setup

1. Personal Information 2. Custodial Agreement 3. Transfer of Assets 4. Review & Submit 5. Summary & Next Steps

Enter Personal Information

SSN 123-45-6789

Prefix

First Name*

Last Name*

Address 1*

Address 2

Address 3

City*

State*

Zip*

Location*

Date of Birth* / / (mm/dd/yyyy)

Date of Hire / / (mm/dd/yyyy)

Phone - -

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Account Setup

1. Personal Information 2. Custodial Agreement 3. Transfer of Assets 4. Review & Submit 5. Summary & Next Steps

Summary & Next Steps

Personal Information

Name Mrs. Annette Slater

Address 400 Puntan Way
Marlborough, MA 01752
Worcester County
United States

Location 245 Summer

Date of Birth 06/04/1956

Date of Hire 06/04/2000

Phone (617) 555 - 1212

Custodial Agreement

Signed Digitally

Transfer of Assets

will not transfer other retirement assets to Fidelity

Next: Log in to NetBenefits to enroll
(you may need to set up your PIN first)

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Fidelity NetBenefits[®]

New User Registration

Enter User Identification

Please enter the following information to help verify your identity.

SSN: **012-34-5678**

Date of Birth: / /
(mm/dd/yyyy)

Zip Code:

Choose Customer ID or Social Security Number Option

You can create a Customer ID to use with your PIN instead of your Social Security number for log in. You can change this option online at any time.

I want to create a Customer ID for login

Use my Social Security number for login

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Fidelity NetBenefits[®]

Confirmation

You have created a new Customer ID and PIN

New Customer ID: **99annette**

- Learn more about [Using your Customer ID](#).
- View your employee benefits on [NetBenefitsSM](#).

Do you use any of the services below? You may need to make additional changes.

Fidelity's Telephone Services	Use the numeric equivalent of your Customer ID. For 99annette this is 992663883 . Convert your Customer ID to numbers by using your telephone keypad.
• Full View [®] • Microsoft [®] Money • MS Investor • Quicken [®]	Manually update Social Security number and PIN information with your new Customer ID and PIN to download Fidelity account data. Update your Full View Account Settings

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