# GETTING STARTED WITH YOUR FIDELITY ACCOUNT

**Welcome to Fidelity! Here's a simple checklist to help you make the most of your 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/ut
- Follow the instructions to register
- 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/ut
- Click *Quick Links*
- Select *Summary*
- Review the *Contributions* tab
- Review the *Investments* tab

## UPDATE YOUR BENEFICIARY INFORMATION

**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®:**

- **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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Fidelity INVESTMENTS