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.

**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

**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

**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.