Getting started with your new Fidelity account

Welcome to Fidelity! Here's a simple checklist to help you make the most of your new 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 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/ut
- ✓ Select *Accounts & Benefits* from the top navigation bar
- ✓ Review the *Manage contributions* tab
- ✓ Review the *Manage 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®:

- ✓ **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

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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