DAVIS SEILEY
WEALTH MANAGEMENT

4710 Fourth Street, Suite 300 La Mesa, CA 91941 TEL: 619-697-2684 FAX: 619-697-8257

Fidelity.com Online Account Access Set Up Instructions

Direct access to your Fidelity Account information, including historical statements, is available at www.fidelity.com.

Follow the procedure below to register for the first time.
We are happy to help you along the way. Email or call us at 619-697-2684.

Note: If you already have a login for fidelity.com through other sources such as a Fidelity 401(k), Profit Sharing Plan, or Pension plan, or a previous personal account, you will need to continue using the same fidelity.com login you already have and do not need to set up another one.

1. Go to www.fidelity.com.
2. At the very top right of the page you will see a Log In link -- please select that.
3. On the right half of the screen under the heading New User there is a link for New User Registration, please select.
4. Input the last 4 digits of your social security number, your first & last name, and your date of birth. Click Next.
5. Create a Customer ID, PIN, and Security Answer (be careful to follow the Fidelity suggested guidelines in creating the ID, PIN, and Security Answer).
6. Your new User Registration is complete. Select Continue to Fidelity.com.
7. You may now enter a Primary E-mail and Secondary E-mail if you wish before clicking OK. This is not necessary so leave blank if you prefer.
8. Follow the one-time prompts to accept the User Agreements. You will need to ***select the radio button for Non-Professional Subscriber*** at the end. Type your own name as the Subscriber and re-type your name as proof of signature.
9. You will now be at the home page showing your portfolio total and list of accounts.

What if I want to see other family member accounts along with mine?

When you log in, the accounts you see are determined by your social security number. If you would also like to see your spouse's accounts there as well for example, your spouse must grant viewing access:

1. The person who wants to grant viewing access to her/her accounts logs in at www.fidelity.com.
2. Click the Accounts & Trade tab, select Update Accounts/Features.
3. In the upper left toolbar, under Account Features, select Account Access Rights.
4. For each account listed, there will be a link to Grant Someone: Inquiry Access.

5. Enter the Social Security Number, First Name and Last Name of the person you wish to view your accounts, select Next>.
6. Confirm the information and select Accept>. You will receive a Confirmation if the access was granted successfully.
7. As soon as you log out and the other person logs in, the account will be visible on both logins. Don't forget to grant the inquiry access for each account listed to be able to view them all. Inquiry access may be revoked immediately and at any time.

What if I want electronic delivery of statements, trade confirmations, prospectuses, and some other items?

1. Log into your account at www.fidelity.com.
2. Click the Accounts & Trade tab, select Update Accounts/Features.
3. In the Communication Options column, select Electronic/Paper Mail Delivery.
4. Here you can set/update the Delivery Options for each type of document.
5. An online consent form appears to enter e-mail address for delivery and click I Agree.
6. A confirmation message will appear to show your updated preferences.

Selecting electronic delivery reduces the amount of mailed paper items but does not get rid of it completely. Investors are protected under the SEC and for the purposes of disclosure some items must be mailed directly to the client address of record.

What if I'm fed up and can't seem to log in or set my options!?

Give us a call at 619-697-2684.