Activating your Fidelity Account[®] A quick-start guide for stock plan participants

Your company stock plan can be an important benefit for you but only if you activate your account. Just follow these easy steps.

Create Your Password

Before you can activate your Fidelity Account,[®] you must ensure you have a password to access your information. If you have an existing individual brokerage account with Fidelity or if you already have a NetBenefits password for other benefit programs, you do not need to create a new password—you will have the convenience of accessing all of your information with the same password.

- **Step 1** Log in to **netbenefits.fidelity.com**.
- **Step 2** Establish your username and password by clicking *Register Now.*
- Step 3 Complete the information requested to verify your identity, including the last four digits of your Social Security number, date of birth, and first and last names.
 - Click Next.
- **Step 4** Create a new username.
 - By default, your username is your Social Security number (SSN). For security reasons, we recommend that you change your username. Click the button to *Create username* to complete.
 - Create your password. You can enter your current password, if you have created it previously. Otherwise, use the following criteria to create your password:
 - 6 to 12 letters and/or numbers
 - No sequences (e.g., 1234) or a single repeating number or letter
 - Do not use Social Security number, username, or date of birth
 - Create a security question and answer and provide your email address. Click Submit.
- Step 5 You have successfully created your password and username. You may now log in to netbenefits.fidelity.com to activate your Fidelity Account.



Your Accounts:	\$ 84,668.46		
Retirement Accounts \$3,763.46	Theta Stock Option Plan 21654: SOP	Activate	
Stock Plan \$ 74.085.00	Theta Employee Stock Purchase Plan Annette's Stock Purchases: 917358	Enroll	
Other Accounts \$6,820.00	Theta Restricted Stock Units Plan Annette's Restricted Stock Units: 511172	Activate	
	Theta Performance Plan Annette's Performance Award Plan: 318546	Activate	

Screenshot is for illustrative purposes only.

F idelity .com		Stock Plan Services Account
About You > About Yo	ur Account > Review & Confirm > Next Steps	This is a secure transaction.
Personal Inf	Questions?	
In accordance with fed	eral law, Fidelity Investments must obtain certain information to use in	800-544-9354
veritying your identity	prior to opening your account. Learn More.	
Personal Information	n	
Your Name	JOHN SAMPLE	
Date of Birth	01/01/1965	
Daytime Phone	ext	
Evening Phone		
(optional)		
Email Address		
Citizenship		
Country of Citizenship	United States Other	
Country of Tax Residence	United States Other	
Legal/Residential Ad	ddress	
Address Line 1	123 MAIN STREET	
Address Line 2 (optional)	APT 7	
City	SALEM	
State	Oregon •	
Country	United States -	
ZIP Code	97007 –	
	Check if your legal address is different from your mailing address.	
Mailing Address		
Address Line 1	1234 WASHINGTON STREET	
Address Line 2 (optional)	APT 7	
City	DURHAM	
State	North Carolina -	
Country	United States	
ZIP Code	27707 _	
Exit	Continue	
	continue	

1. Log in to your **Fidelity Account®** and click *Activate* in the Stock Plan section to start the activation process.

 2. You've launched the application for your new Fidelity Account.
 Fill in all the required **Personal** Information. Then click Continue.

> **Note:** Portions of the account owner information may be prefilled based on information provided by your employer.

Screenshot is for illustrative purposes only.

Fidelity.com		Stock Plan Services Account
About You > About Yo	ur Account > Review & Confirm > Next Steps	This is a secure transaction.
	t Information egulations require that we obtain your employment informatio	Questions? 800-544-9354
Employment Status		
Employment Status	Retired •	
Associations Do you work for or are you Authority (FINRA)?	associated with a stock exchange, broker-dealer, or the Financial Industry Reg Yes No	ulatory
Company Name	We may contact you or the compliance officer at your company to obtain the required Jocu open this account.	mentation to
Are you or an immediate fan held company? 😮	nily/household member, a director, corporate officer, or 10% shareholde of a	publicly-
Company Name	S Yes O No	
Trading Symbol or CUSIP		
🛛 Exit	Previous Continue	
-		
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3. Complete the **Employment** Information.

Select Yes or No to questions regarding your Associations. Then click *Continue*.

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 Review the eDelivery Account Settings. If you need any of these documents sent to you by mail, uncheck the applicable boxes.

		Stock Plan Services Account
✓ About You > ✓ Ab	out Your Account > Review & Confirm > Next Steps	This is a secure transaction.
Review and Please review each se	Confirm ction carefully and make changes using the appropriate links.	Questions? 800-544-9354
Account Informatio	n 📃	
Registration	Stock Plan Services Account	
Account Number	XXXXXXXXX	
Personal Information	n Edit	
Primary Account Holder	JOHN SAMPLE XXX-XXXXXX 01/01/1965	
Contac	(617) XXX-XXXX	
Country of Citizenship	UNITED STATES	
Country of Tax Residence	UNITED STATES	
Legal/Residential Address	123 MAIN STREET APT 7	
	SALEM, OR 97007	
Mailing Address	1234 WASHINGTON STREET APT 7 DURHAM, NG 27707	
Employment Inforr	nation Edit	
Employment Status	Retired	
Investment Industry	No	
Corporate Control Status	No	
Account Settings	Edit	
	Enrolled	
eDelivery	eDelivery gives you the option to receive certain account communications by email. The communications listed below will be sent to you in email. You can change your eDelivery preferences now or after your account is opened.	
eDelivery	eDelivery groves you the option to receive certain account communications by email. The communications listed below will be sent to you in email. You can change your eDelivery preferences now or after your account is opened.	
eDeilvery	e Dativery groves you the option to receive certain account communications by email. The communications listed below will be sent to you in email. You can change your eDelivery preferences now or after your account is opened. Account Statements Trade Confirmations and Related Prospectuses	
eDelivery	eDairey groves you the option to receive certain account communications by email. The communications listed below will be sent to you in email. You can change your eDelivery preferences now or after your account is opened. Account Statements Trade Confirmations and Related Prospectuses Prospectuses, Shareholder Reports and Other Documents	

5. **Review and confirm** your information. Click Confirm My Information.

If anything's incorrect, make changes now by clicking *Edit*.

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Fidelity.com	Stock Plan Services Account		
✓ About Your Account > Review & Confirm > Next Steps	This is a secure transaction.		
Agree to Terms	Questions?		
	800-544-9354		
1. Open the Customer Agreement and review the Terms & Conditions			
Upen, read, and print the following document: Customer Agreement (PDF) Please scroll through for important information related to your account.			
The following accounts and transactions are currently excluded from the electronic derivery program:			
Customers who have a loteling permanent address Corporate accounts and trust accounts Patrament name for which Eidality is not the trustee sponsor or record-keeper			
Annuity contracts or life insurance policies issued by Fidelity Investments Life Insurance Company Accounts for which a foreign permanent address is maintained			
Transactions involving government-sponsored entities (GSEs) and initial public offerings (IPOs) Fidelity record-kept 401(k), 403(b), and 457 accounts			
Тор			
To retain these documents, open the Customer Agreement (PDF) or click the links and print the document. If you are unable to view or access any of these documents, please exit this application. You may obtain			
paper copies of this application or any of these documents listed above at no charge by calling 800-544- 6666.			
2. Review the taxpayer certifications			
You certify under penalities of perjury that:			
a. The Social Security number or taxpayer identification number you have provided is correct; and			
b. You are a U.S. citizen or other U.S. person (as defined in the IRS form W-9, including a U.S. resident alien); and			
c. Unless you have checked the box immediately below these certifications, you are not subject to backup withholding because			
 you are exempt from backup withholding, or 			
• you have not been notified by the Internal Revenue Service (IRS) that you are subject to backup			
withnoiding as a result of a failure to report all interest or dividends; or the IPS has notified you that you are no longer subject to backup withholding.			
Check		IMPORTANT	Only click here if yo
withnow cause you have failed to report all interest and dividends on your tax return.		been informe	ed by the IRS that yo
3. Check the box to confirm the statement		subject to ba	ckup withholding.
Tyou as the second s		-	
with, he and understood, and agree to be bound by all the terms and conditions set forth in this application in step 1 as they are currently in effect and as they may be amended in the future including			
but not limited to the Fidelity Account® Customer Agreement, Electronic Delivery Terms of Agreement and other documents in alectronic format worklided in start 1 above. This action wild ement any second			
to this new account application process and delivery of the documents provided above.		6. Click this	s box to verify tha
This account is governed by a <u>pre-dispute arbitration clause</u> 🗗 which is part of the Fidelity		read and	l agree to the ter
Customer Agreement and which is accessible by clicking on the preceding underlined link. I acknowledge receipt of the pre-dispute arbitration clause.			
The IRS does not require your consent to any provision of this document other than the		the agre	ement.
cerupted on the sequence of a voia backup withnoiding. Click the "Agree & Open Account" button to sign this electronic application, to acknowledge and agree to all			
of the foregoing, to submit your information to Fidelity, and to open your account.			
Exit Previous Agree & Open Account		Click here t	to agree and one
		Vour accou	nt
		your accou	
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Fidelity.com	Stock Plan Services Account		
✓ About Your Account > ✓ Review & Confirm > Next Steps	This is a secure transaction.		
		7\\/bar	u rooch this set
		7. vvnen yc	ou reach this poin
		have suc	cessfully activate
Go to Portfolio Summary to view your Stock Plan Account.		Fidelity A	Account and are
Your Fidelity Account gives you the opportunity to take advantage of all the investment		take adv	antage of all the
products and services Fidelity offers.			
In addition to managing your Stock Plan, use your Fidelity Account to manage your cash and		your sto	ek plan has to off
investments with credit and debit cards, and checking account features (minimums and fees may apply).			
Next Steps: Explore Account Features Add Cards & Checking to your Fidelity account including online bill naumont			
ATM, credit cards, checkwriting, direct deposit, and more. Establish Money Line to move money between your bank and your Fidelity			
accounts. Call a Fidelity Stock Plan Services representative at 800-544-9354 for more			
information.			
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	Terms of Use Privacy Security		

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