

# How to open your Fidelity Account

A step-by-step guide for Amazon participants



Complete the account opening process as outlined in Steps 1 through 14 below.

Before you get started, you will need your Social Security number and date of birth.

## Step 1

### Log In

If you already have Fidelity login credentials, you will be taken to **Step 8—Open Account** when coming from the Amazon Stock portal.

Otherwise, you will need to create a password before you can proceed. Click *Create a Password* to begin.

## Step 2

### Verify Your Identity

The first part of the registration process will verify basic information about your account.

Enter the information requested in the blanks.

Once all information is entered, click *Submit*.

Screenshots are for illustrative purposes only.

### Step 3

Extra security step required

We need to send you a code to verify that you're the account owner. Please select the best way to send the code. For account safety, you cannot use new contact information.

K...g@amazon.com

Select this link if you can't receive a code

Next

Cancel FAQ | Security Terms

#### Extra security step required

We need to send you a code to verify that you're the account owner. Please select the best way to send the code from the options provided on the screen.

As an Amazon participant, it's likely that your work email is the only option. Make your choice, if applicable, and click *Next* to continue.

**IMPORTANT:** If you are shown a work email that you cannot access, please click *Select this link if you can't receive a code*. You will be prompted to call Fidelity to verify your identity over the phone.

### Step 4

We sent you an email

Remember not to close this window when you check K...g@amazon.com for your code. You may also need to look in your Junk mail folder.

Security Code

The code expires in 30 minutes. Didn't get the code? Request another one

Next

Cancel FAQ | Security Terms

#### Security Code

Retrieve the code that was sent to you based on your choice in Step 3. Be careful **not** to close this window while retrieving the code. If it was sent via email and you are not seeing it, be sure to check your Junk folder. Enter the security code and click *Next*.

Screenshots are for illustrative purposes only.

## Step 5

**Registration**

Create a username and password for online access to your account.

Enter a username

Use 6-15 characters, including at least two letters.

**You may not use**

- Special characters or symbols
- Sequences (e.g., 12345 or 11111)
- Personal info (SSN, phone #, DOB)

Create a new password

Password Strength:

Use 6-20 characters. Letters are case-sensitive.

**You may not use**

- "#&\*-<>{}'[]"
- Sequences (e.g., 12345 or 11111)
- Personal info (SSN, phone #, DOB)

[Learn more about strong passwords](#)

Confirm your password

### Registration

Create a username and password:

#### Username

6–15 letters and/or numbers, including at least two letters. You may not use:

- Special characters or symbols
- Sequences (e.g., 12345 or 11111)
- Personal info (SSN, phone number, or date of birth)

#### Password

6–20 letters, numbers and/or certain special symbols. Letters are case-sensitive. You may not use:

- "#&\*-<>{}'[]"
- Sequences (e.g., 12345 or 11111)
- Personal info (SSN, phone number, or date of birth)

Click *Continue*.

## Step 6

Select a security question

To safeguard your accounts, we require you to select a security question and answer. This will be used to confirm your identity.

Security Question

Your Answer

Answers are not case-sensitive and must be between 3 and 31 characters, including spaces

### Select a security question

To safeguard your accounts, we require you to select a security question and answer. This will be used to confirm your identity. Once complete, click *Submit*.

## Step 7

**Registration Successful**

Use this login information to access your online accounts at Fidelity, NetBenefits, eWorkplace, or when calling by phone.

Your Username Test11111

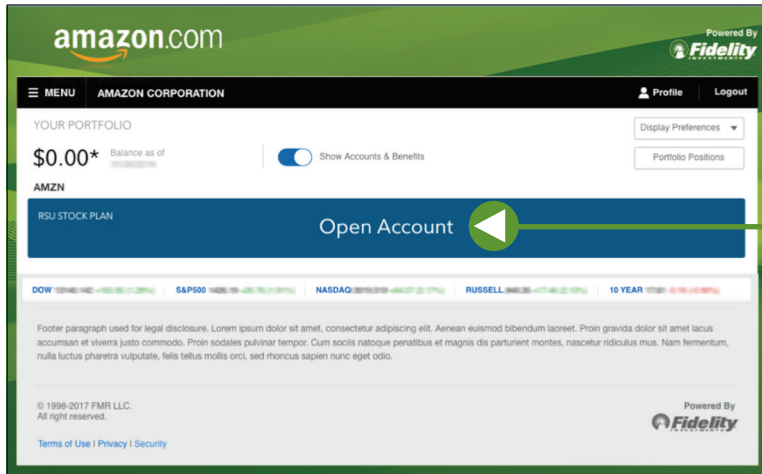
### Registration Successful

You will see a confirmation of successful registration. Be sure to save your username for future reference.

Click *Continue* to complete the account opening process.

Screenshots are for illustrative purposes only.

## Step 8



### Open Account

Click the blue *Open Account* bar to begin.

## Step 9

### Personal Information

Federal law requires Fidelity Investments to obtain certain information to verify your identity prior to opening your account.

All fields are required unless otherwise noted.

Please take a minute to review, edit, and verify information from your account.

Click *Next*.

### How to update your Amazon Employee Address?

If your address on NetBenefits.com is not accurate, active Amazon employees can change their address easily through PeoplePortal. In PeoplePortal, click the *Personal Information* link to update your address. A to Z users can click the *Profile* button to update their address: updates will automatically carry over in 3–5 business days when Amazon sends updated address data to Fidelity.

Active Whole Foods Market Team Members can change their address in Workday.

## Step 10

### Employment Information

Regulations require that Fidelity obtains your employment information.

### Associations

Please be aware that most individuals typically answer *No* to both associations questions; however, if either of the two bullets below do apply to you, you must answer *Yes*.

- Are you employed by or associated with a broker-dealer, stock exchange, exchange member firm, Financial Industry Regulatory Authority (FINRA), or a municipal securities dealer?
- Are you or an immediate family/household member, a director, corporate officer, or 10% shareholder of a publicly held company?

Click *Next*.

## Step 11

**Fidelity**

✓ About You > Your Account > Confirm > Next Steps

### Account Settings

All fields required unless otherwise noted.

#### Core Position

Your **core position** is where the money in your account is held until you invest it. Money deposited in the account will be held in the Fidelity® Government Money Market Fund. You may be able to change your election after your account is open. For more information, contact Fidelity.

#### Email Preferences

Receive financial documents electronically?  Yes  No

eDelivery<sup>1</sup> sends account statements, trade confirmations and related prospectuses, tax forms<sup>2</sup> with related disclosures, as well as prospectuses, shareholder reports, and other disclosures to you electronically. To receive these documents by mail, select No.

Save & Finish Later

1. Note to existing Fidelity Customers: Your enrollment in eDelivery of statements, confirmations, prospectuses and reports will be applied to all the Fidelity accounts associated with your Social Security number, with the exception of certain accounts and transactions that are not eligible. If you have previously grouped accounts in your household together and one of those accounts is not eligible for eDelivery, then you will not be able to participate in eDelivery for any of your other accounts regardless of your selection in this online application. You can verify or update your eDelivery preferences or your email address by visiting the Customer Service > Update Your Profile > Mail Preferences area on Fidelity.com.  
2. Tax forms available for eDelivery at this time: 1099-DIV, 1099-INT, 1099-OID, 1099-B, 1099-NEISC, 1099-D, 1099-OID (for REMICS), 1099-R, 1099-SA, 1099-Q, MBS, 5498, 5498-SA, California 592B, Corporate S 1099, and Corporate Information Only 1099. Additional forms may be added in the future.

### Account Settings

#### Core Position

Your core position is where the money in your account is held until you invest it. When you open your account, the default core position is the Fidelity® Government Money Market Fund. You may be able to change your election once your account is open.

#### Email Preferences

By leaving the default option of **Yes**, you are agreeing to receive account statements, trade confirmations and related prospectuses, and tax forms with related disclosures, as well as prospectuses, shareholder reports, and other disclosures, electronically.

Click *Next*.

## Step 12

**Fidelity**

✓ About You > ✓ Your Account > Confirm > Next Steps

### Review and Confirm

Please review each section carefully and make changes using the Edit links.

#### Account Information

Registration: Stock Plan Services Account

#### Personal Information | Edit

Account Owner: JOHN DOE  
-1111  
03/12/1960  
Contact: 555-555-5555  
johndoe@email.com  
Country of Citizenship: UNITED STATES  
Country of Tax Residence: UNITED STATES  
Legal Residential Address: 900 Salem Street  
Smithfield, RI 02917  
Mailing Address

#### Employment Information | Edit

Employment Status: Not Currently Employed  
Associated Company Information: No  
Corporate Control Status: No

#### Account Settings | Edit

Core Position: Fidelity® Government Money Market Fund  
eDelivery: Enrolled

Save & Finish Later

### Review and Confirm

Please review each section carefully and make changes using the Edit links.

Click the blue *Confirm My Information* button to continue.

## Step 13

**Fidelity**

Confirm > Next Steps

### Agree to Terms

Open, read, and save each of the documents below.

<a href="#">Customer Agreement (PDF)</a>	Documents that govern your account, including the Fidelity Account Customer Agreement and information concerning privacy, fees, commissions and your core position
<a href="#">Terms &amp; Conditions (PDF)</a>	Terms and conditions applicable to opening your account
<a href="#">Householding of Shareholder Documents (PDF)</a>	Description of how certain financial documents for your account will be delivered to individuals in your household
<a href="#">Electronic Delivery Agreement (PDF)</a>	The consent to receive certain financial documents for this account electronically rather than through the U.S. mail
<a href="#">SPAXX prospectus</a>	Prospectus for Fidelity® Government Money Market Fund

In this application, "you" refers to all account owners. If you are unable to view or access these documents, please exit this application. You may obtain paper copies of this application or any of these documents listed above at any time at no charge by calling 800-343-3548. You can also find the preceding documents at Customer Service > Forms & Applications.

**Do you agree to the electronic delivery of the above documents?**

**Certify your taxpayer identification number.**

Under penalties of perjury, you certify that:

- The Social Security number or taxpayer identification number you have provided is correct (or you are waiting for a number to be issued to you), and
- You are a U.S. citizen or other U.S. person as defined in the instructions to IRS form W-9, including a U.S. resident alien; and
- 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 withholding as a result of failure to report all interest or dividends, or
  - the IRS has notified you that you are no longer subject to backup withholding.

You must check this box if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

**By selecting Open Account below, you acknowledge that you:**

- Are the person named in this account application;
- Have been provided with the above documents electronically and do not need a paper copy;
- Have read and understood, and agree to be bound by the above documents, which set forth the terms and conditions of this account, 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 and related documents, Terms and Conditions, consent to Householding of Shareholder Documents, Electronic Delivery Agreement and other applicable notices, disclosures and documents (collectively, the "Agreement");
- Will electronically sign this application by selecting Open Account.

**This account is governed by a [pre-dispute arbitration clause](#) which is part of the Fidelity Customer Agreement and which is accessible by selecting the preceding link. By selecting Open Account, you acknowledge receipt of the pre-dispute arbitration clause.**

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Save & Finish Later

### Agree to Terms

Review the Customer Agreement and other documents.

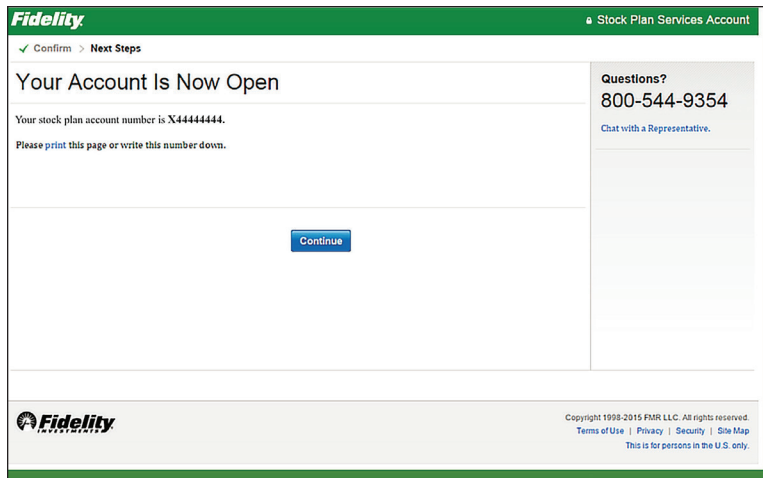
The Fidelity® Government Money Market Fund is the Core Account where proceeds from stock sales will be deposited.

Select Yes to agree to electronic delivery of the documents.

**IMPORTANT:** Most individuals do not check this box. Click here only if you've been informed by the IRS that you're subject to backup withholding.

Once ready, click the blue *Open Account* button to complete the account opening process.

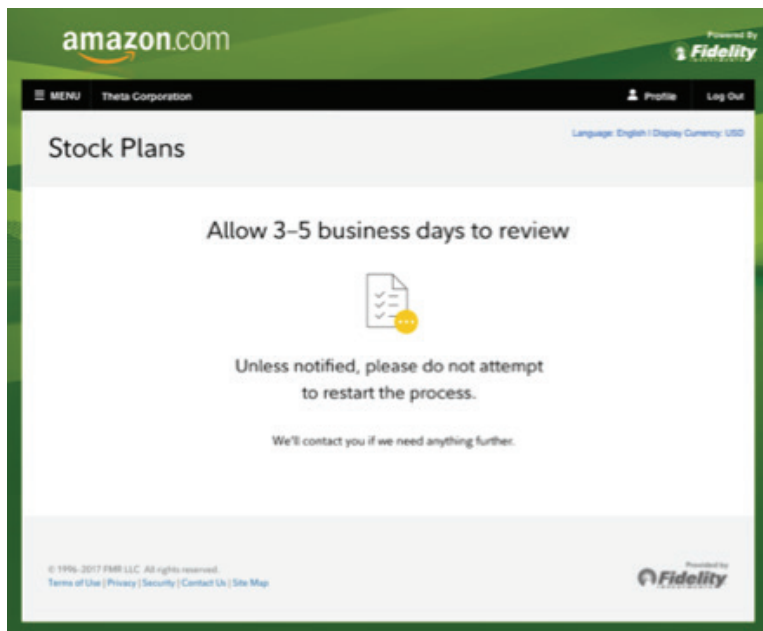
## Step 14



Screenshots are for illustrative purposes only.

You will see confirmation that you have successfully completed your account opening process.

Printing this confirmation page is optional. Please note your account number for future reference.



**If your account opening is not successful**, you will see an online message notifying you that your application is under review. Please check back any time after five business days to see if it is complete. Fidelity will contact you if additional information is needed.

Fidelity Stock Plan Services, LLC, provides recordkeeping and/or administrative services to your company's equity compensation plan, in addition to any services provided directly to the plan by your company or its service providers.

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