

# Getting started with NetBenefits<sup>®</sup>

[www.fidelity.com/atwork](http://www.fidelity.com/atwork)



Easy guide to NetBenefits<sup>®</sup>



Smart move.<sup>®</sup>

# ▶ Explore.

www.fidelity.com/atwork

The *Savings & Retirement* page lists your retirement savings plan accounts, and any other personal accounts you have with Fidelity Investments.®

**Tip:** If you want to take a specific action, use the drop-down menu to the right of each account.

**THETA**

Home Savings & Retirement Your Profile

### Savings & Retirement

Your Portfolio

Your Portfolio provides an overview of your account(s), along with tools to manage your investments.

Accounts Portfolio Investments Portfolio Research Portfolio Analysis

Home, Categorize, or Hide Accounts

Retirement Accounts		
THETA SAVINGS PLAN Annette's 401k: 81345	\$50,368.00	Select Action
<b>Total</b>	<b>\$50,368.00</b>	

Investment Accounts

Screenshot is for illustrative purposes only

## Check balances.

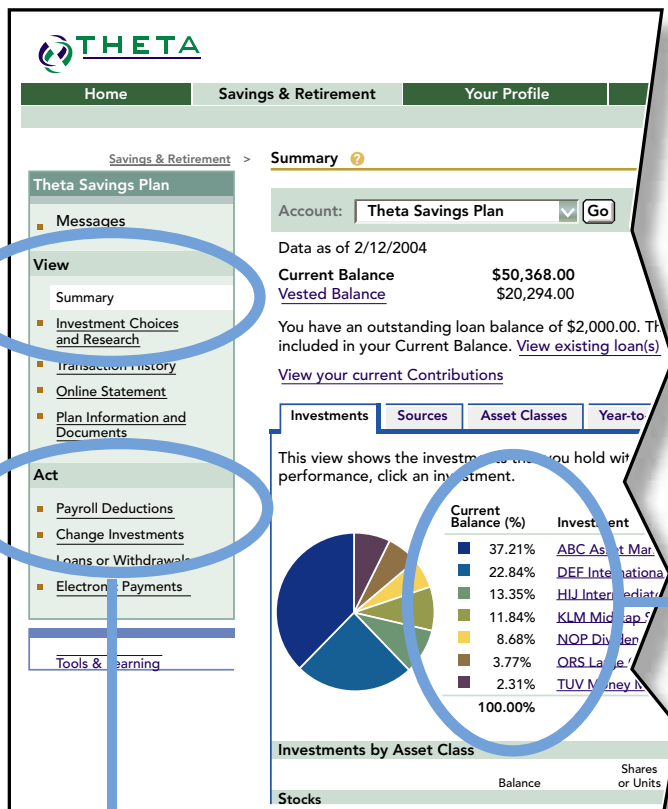
Select from your retirement savings plan and any personal Fidelity accounts. Click on the *Portfolio Investments* tab for more details.

# ▶ Act.

www.fidelity.com/atwork

The *Savings & Retirement Summary* page provides an overview of your current investments, as well as links to help you analyze your individual investment options and make changes virtually anytime.

**Tip:** Many experts suggest you should review your investment mix at least once each year—and with any major life change.



Screenshot is for illustrative purposes only

## Act.

Keep your planning strategy and portfolio in line with your goals and make changes virtually anytime.

## View.

See your statement, plan information, and a history of your account transactions.

## Analyze.

Review your account details by *Investments*, *Sources*, *Asset Classes*, and *Year-to-Date Change*.

# ▶ Learn.

www.fidelity.com/atwork

The *Tools & Learning* resources at NetBenefits can help you dig into a range of personal finance topics. Then you can use handy resources on the site to make decisions with confidence.

**Tip:** Take advantage of interactive resources to save more and invest more confidently.

Savings & Retirement | Health & Insurance | Your Profile

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## TOOLS & LEARNING

### Retirement Planning Resources

Need help achieving your financial goals? Use our wide range of online planning tools to tailor your own retirement plan. No matter where you are in the process:

- Estimate your financial needs in retirement
- Determine and track your investment strategy
- See how changes in your plan can affect your savings

➔ [Create Your Retirement Plan Now](#)

#### Calculators

- ▶ [Retirement Calculators](#)
- ▶ [Calculators for your finances](#)
- ▶ [Withdrawal Calculator](#)
- ▶ [Take Home Pay Calculator](#)

#### Watch these Informative Videos

- ▶ [Excessive Trading Defined, Rules Explained](#)

Two presenters explain excessive trading and new rules to dis

Screenshot is for illustrative purposes only

## Use online tools.

Interactive tools and calculators can help you work out:

- contribution rates
- your investment strategy
- whether you're on track to reach your retirement savings goals

## Experience e-Learning.

At your own pace and convenience, Fidelity e-Learning workshops teach you the fundamentals of saving and investing successfully for your retirement.

# ▶ Begin.

www.fidelity.com/atwork

The NetBenefits *Home* page shows your retirement savings plan accounts and offers helpful links to learning tools and timely news.

**Tip:** It makes sense to check your balances after each payroll contribution.

**THETA**

Home Savings & Retirement Your Profile

Welcome to NetBenefits® for Theta Corporation

**Savings & Retirement**

Savings Plan	(Hide \$)
<a href="#">THETA SAVINGS PLAN</a>	\$50,368.00
<b>Other Plans/Accounts**</b>	
<a href="#">Show other plans/accounts</a>	
<b>Total</b>	\$50,368.00

**Don't miss out on employer match.**

You are currently deferring... retirement savings plan. Increasing your deferral... maximum amount your match.

[Get the match now.](#)

**Planning Resources**

- [Tools & Learning](#): Access the latest online workshops, tools, calculators, and educational content.

**Your Profile**

Manage your personal info

- [Update E-Mail](#)
- [Your Profile](#)

Screenshot is for illustrative purposes only

## View your accounts.

Simply click on the account name to manage that account.

## Review your profile.

Go to *Your Profile* to review your personal information, choose online statements, manage the display of any personal Fidelity accounts within NetBenefits, and more.

# NetBenefits<sup>®</sup> – So simple to get into.

## Visit NetBenefits as often as you like, to:

- Review your progress
- Assess your saving and investing strategy
- Learn something new about managing your money



### ▶ **Make it a habit to visit often.**

Generally, you should review your plan regularly—at least once each pay cycle or whenever you're anticipating a major life experience that could affect your finances.



Smart move.<sup>®</sup>

*Before investing in any mutual fund, please carefully consider the investment objectives, risks, charges and expenses. For this and other information, call or write Fidelity for a free prospectus. Read it carefully before you invest.*

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