



Fidelity Online Enrollment Instructions

You are just a few easy steps away from enrolling in your Employer's Retirement Plans.

This process should only take approximately 15 minutes.

1 Obtain your Plan ID: 72037 - Utah State University 457(b) and ROTH 457(b)
73965 - Utah State University 401(a)
52751 - Utah State University 403(b) and ROTH 403(b)

2 Visit: <http://enrollonline.fidelity.com>

3 Account Setup: Provide us with your personal information and custodial consent.

4 User Registration: Select a User Name and Password to access your account online and/or Log On.

5 Enroll In Plan: Make decisions about contribution amounts and investments. Your 403(b) and 457(b) contributions can be designated under regular Pretax or Roth or a combination.

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- ▶ Contact Fidelity to obtain an Enrollment form kit, available as an alternative method to online enrollment.
 - ▶ Contact your Employer to obtain a Salary Reduction Agreement form to begin contributions once your account is established; you may be asked to provide confirmation of your new account.
 - ▶ Local Fidelity Retirement Planners are available to meet with you in person. To set up an appointment on your campus, call 1-800-642-7131 or register online at <http://getguidance.fidelity.com>.
 - ▶ Contact Fidelity, your employer, or your tax advisor to determine maximum allowable contribution.
 - ▶ Questions? Call Fidelity Investments at **1-800-343-0860**, Monday through Friday, from 5:00 a.m. to 9 p.m. MT, excluding holidays that the New York Stock Exchange is closed, or visit us at www.netbenefits.com/atwork.

Investing involves risk, including risk of loss.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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