



Fidelity Investments Login and E-delivery preferences

New Client Login Instructions

Go to www.fidelity.com

- Click “Customer Login” button on the left menu bar
- Choose the “New User Registration” link found to the right of the login screen.
 - Enter the last four digits Social Security Number; First and Last Name, Date of Birth
 - You will be asked to Create a new Customer ID (6-15 letters and/or numbers)
 - Create a Personal Identification Number (6-12 letters and/or numbers)
 - Choose a security question, (answers between 3 and 31 characters)
 - Choose next to move to the confirmation screen

To access your accounts via our website:

- Go to www.sdwealthmanagement.com
- Click the “Client Login” on the upper right of the page
- Choose “Fidelity Investments”, this will open another window;
- Click the “client login button on the upper left of the page; you may enter your existing login here.

To Set Up Electronic Delivery of Fidelity Statements, Confirms, Prospectuses and Reports:

1. Login to your accounts
2. In the green banner area choose “Customer Service” tab
3. On the Left side of the screen under “Manage Your Accounts” click “Update Your Profile”
4. On this page under “Preferences” click “Mail Preferences”.
5. Choose “Update Delivery Options
6. Select “E-Mail Delivery” in each box on the page and then click “Next”.
7. Read the Agreement, scroll to the bottom of the page. If you agree with the Terms of the agreement click “I Agree”.
8. The delivery confirmation screen will verify that your changes were successful.

The following page details electronic delivery of additional shareholder materials.

To Set Up Electronic Delivery of Shareholder Materials (Proxy, Annual Reports, etc.)

When you receive a “paper proxy” please first go through steps to vote electronically. This initiates your intent to change to electronic delivery. If you have a single account, electronic delivery will be applied to all the securities that are held in that account. To enroll multiple accounts for electronic delivery, you will need to repeat the steps below for each account.

BEFORE YOU BEGIN

*You will need the control number from the last paper proxy card or voting instruction form you received. This number can be found next to the label **Control No.** or Make sure that the paper document was within 90 days. Otherwise, the control number will expire and you won't be able to access the site to initiate electronic delivery. If your control number is expired, please wait for the next paper document containing an active control number and begin this process before the expiration date.*

Go to www.Proxyvote.com

1. Enter your 12 or 14 digit CONTROL NUMBER in the box, then in the Postal Mail Recipients box click “Vote”.
2. Read the introductory letter and proceed to bottom of page and click “Continue Voting”.
3. Your Proxy Ballot will appear. Scroll down and vote following the directions on the screen.
4. After voting, a verification page will make sure the vote is your final submission. If the ballot is correct, click “Final Submission”
5. A screen will verify that the vote is complete.
6. At this point you can enroll by clicking “Enroll in Electronic Delivery”.
7. On the Investor Delivery screen, fill out the Enrollment Consent Form box. Choose a 4-digit PIN and write it down in a secure place, then click “Submit”. It is recommended to use the same 4-digit PIN for all the account enrollments.
8. A confirmation page shows that the electronic documentation is complete and active. Write down your Enrollment Number. with your 4-digit PIN. A confirmation will also be sent by E-mail. Note: To make changes to your account, you will need both your enrollment number and 4-digit PIN.

To Make Changes to your E-mail Address, PIN or to Cancel Enrollment of Shareholder Materials

1. Go to www.investordelivery.com and enter your Enrollment Number.
2. In the Enrollment Maintenance box, at the lower right corner, enter your 4-digit PIN and click “Submit”.
3. Follow the online prompts to make appropriate changes to your E-Mail Address, PIN, or Cancel Enrollment.