

# Make the Fidelity Apps *Work for You*

Manage your money, investments, and HSA whenever—and wherever—you want.

Each Fidelity® app serves a different function based on their design and purpose. While there is some overlap between apps, they each offer unique features to help you manage your HSA funds and expenses all in one place, keep track of your retirement savings, manage your investments, and learn ways to improve your financial wellness. And because they're from Fidelity, you can feel good knowing the apps are designed to be safe, secure, and easy to use.



# Fidelity Health® App

Manage your Health Savings Account (HSA) on the go.

The Fidelity Health app gives you an easier way to manage your HSA all in one place, wherever you are.

With the Fidelity Health app you can:



**Check your HSA balance and transaction history** and make a one-time contribution to your HSA.



**Track and organize health care expenses** paid out-of-pocket or from your HSA in the app with an easy-to-use platform for storing health care expense receipts.

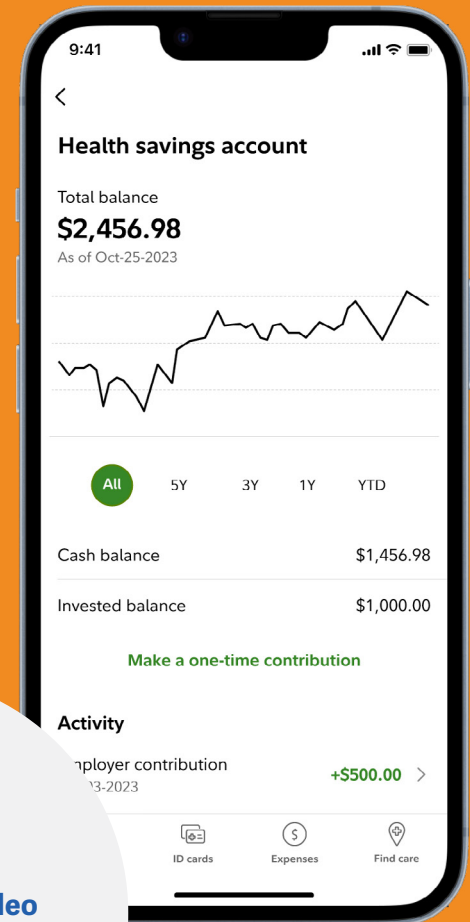


**Manage health care expenses** including paying providers or reimbursing yourself for when paying for qualified medical expenses out of pocket.



**Scan a product's barcode** to find out whether it's a qualified medical expense for an HSA.

Scan the QR code to download the apps directly to your mobile device. Log in with your existing NetBenefits username and password.







**Watch this short video** to learn how the Fidelity Health App makes it easy to manage your HSA.

# Fidelity NetBenefits® App

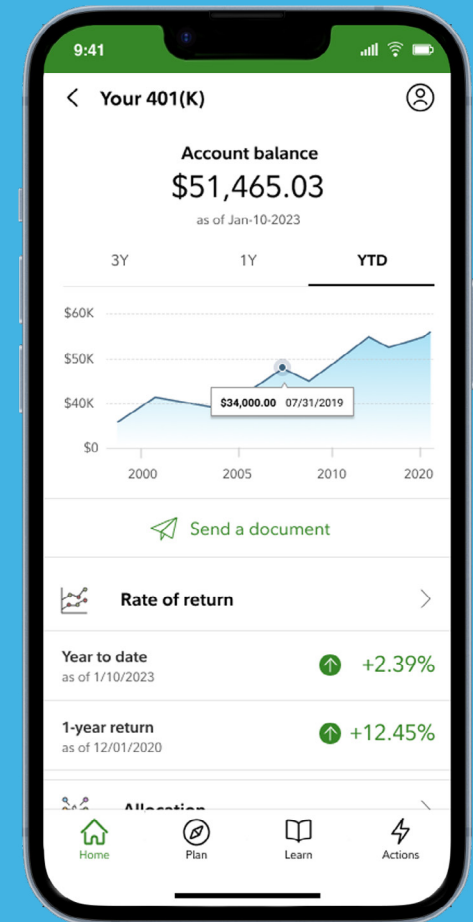
Keep track of your retirement savings and improve your financial wellness.

The NetBenefits App allows you to quickly view and update your Workday Retirement Plan and gives you access to educational videos and articles designed to help you improve your financial wellness. Need to change your HSA contributions? You can do that within the NetBenefits app, too.

## Use the NetBenefits app to:

-  **Easily enroll and make changes** to your retirement plan benefits, including investments and contributions.
-  **View your HSA balance**, manage your expenses and update your contributions.
-  **Securely send** Fidelity documents with your camera.
-  **Improve your financial wellness** with educational videos and articles.

**Note:** You will need to sign in to Fidelity NetBenefits, if eligible. Family members and spouses are not able to access this information.



# Fidelity Investments® App

Keep track of your retirement savings and improve your financial wellness.

The Fidelity Investments app gives you mobile access to a broad range of investments, expert insights, and tools to help you make smart investing, saving, and financial planning decisions.

Here are just a few of the things you can do with the app:



Trade US stocks, commission-free with no account fees or minimums for brokerage accounts.<sup>1,2</sup>



Create savings goals and track your spending.

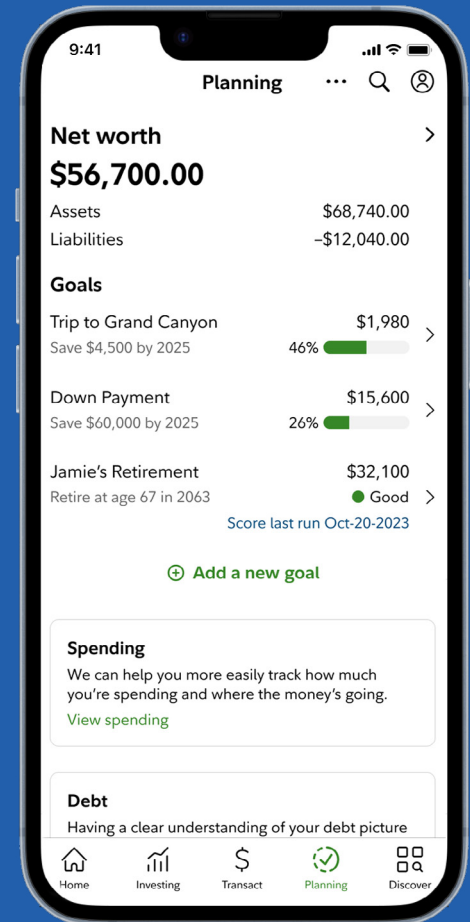


If you have a Fidelity cash management account, you can pay bills, deposit checks, or send money to family and friends.



View and manage *all* of your Fidelity accounts in once place.

Scan the QR code to download the apps directly to your mobile device. Log in with your existing NetBenefits username and password.



# Got Questions or Need Support?



## Fidelity® Representatives

Fidelity representatives can answer questions about your retirement benefits and Health Savings Account (HSA), and help you make changes to your contributions and update your investments. Call **800-835-5095**, Monday-Friday, 8 a.m. to 5 p.m. ET.



## Personalized Planning & Help

Fidelity Workplace Planning Consultants can help with all your planning questions, at no cost to you. If you recently joined Workday, Fidelity Workplace Planning Consultants can also explain how your Workday retirement benefits and HSA work. Log in to **NetBenefits** to schedule a 1:1 appointment.



## Virtual and Onsite Events

We work with Fidelity to offer virtual and onsite events so you can get the most out of your benefits and learn about ways to improve and manage your financial wellness. Log in to **NetBenefits** to register for a virtual event, and keep an eye out for onsite events available three times per month



## Northstar Financial Planning Platform

As a Workmate, you have access to a free sponsored membership to Northstar, a holistic financial planning platform. Work with a dedicated Northstar Financial Advisor on your financial and life goals. They take a life stage approach to personal finance will map out a custom optimal plan to get you there. **Learn more**

<sup>1</sup> **\$0.00 commission applies to online U.S. equity trades and exchange-traded funds (ETFs) in a Fidelity retail account only for Fidelity Brokerage Services LLC retail clients. Sell orders are subject to an activity assessment fee (from \$0.01 to \$0.03 per \$1,000 of principal). Other exclusions and conditions may apply. See [Fidelity.com/commissions](https://www.fidelity.com/commissions) for details. Employee equity compensation transactions and accounts managed by advisors or intermediaries through Fidelity Institutional® are subject to different commission schedules.**

<sup>2</sup> Zero account minimums and zero account fees apply to retail brokerage accounts only. Expenses charged by investments (e.g., funds, managed accounts, and certain HSAs) and commissions, interest charges, or other expenses for transactions may still apply. See [Fidelity.com/commissions](https://www.fidelity.com/commissions) for further details

Screenshots are for illustrative purposes only. Features and functionality vary by client.

Fidelity retail products and services are offered separately from your employer-sponsored retirement plan.

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