Things to Do and View with Fidelity–User Guide

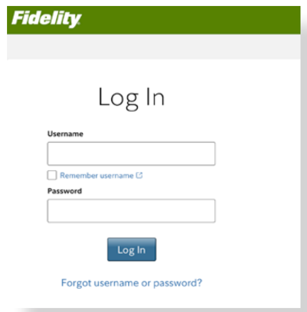
Fidelity.com/portfolio

Now you can easily monitor all your Fidelity Investments accounts, including those Alterra manages, from your desktop, tablet, or smartphone.

Getting Started

Log in to Go to **Fidelity.com/portfolio**. If you've never logged in to Fidelity.com/portfolio, click **SIGN UP** at the bottom of the landing page. You'll need to enter the last four digits of your Social Security number, and your first name, last name, and date of birth, to complete your online registration and create a username and password. To view and monitor your accounts online, simply **log in**:

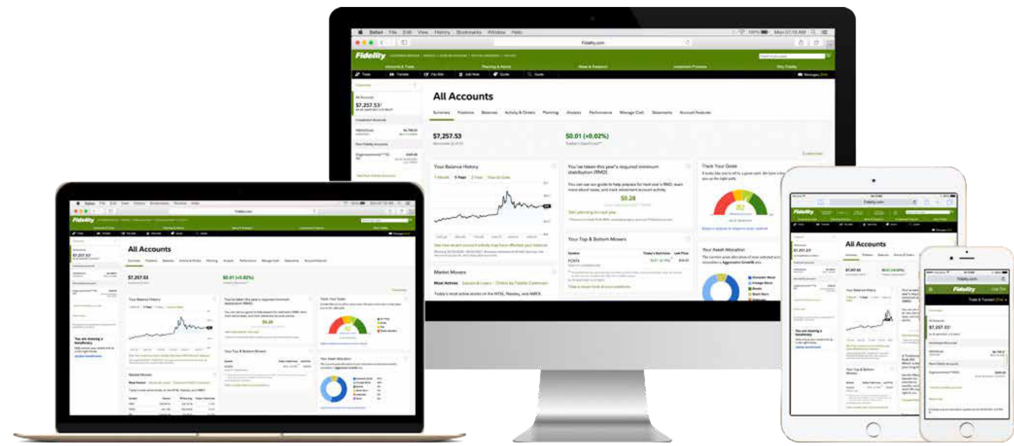
1. Enter your **username.**
2. Enter your **password.**
3. Click **Log In.**



Need Help Logging In

From the Log In page, click **Forgot username or password?** to reset your username or to look up your password.

Fidelity Lets You Manage Your Accounts Securely—Anytime, Anywhere



Monitor your accounts online

View your balances, holdings, and transactions on all your Fidelity Investments accounts, including those that Alterra manages. Click **Accounts & Trade**, then go to **Portfolio** to get started.

View and Print Statements

Get up to 10 years of statements and confirmations online. Click **Accounts & Trade**, then go to **Documents**.

Get tax forms and reports

View your tax forms, reports, and confirmations online, and monitor your year-todate tax situation. Click **Accounts & Trade**, then go to **Tax Forms & Information**.

Questions?

Contact your Client Care with any questions about your accounts.

Alterra
ADVISORS