

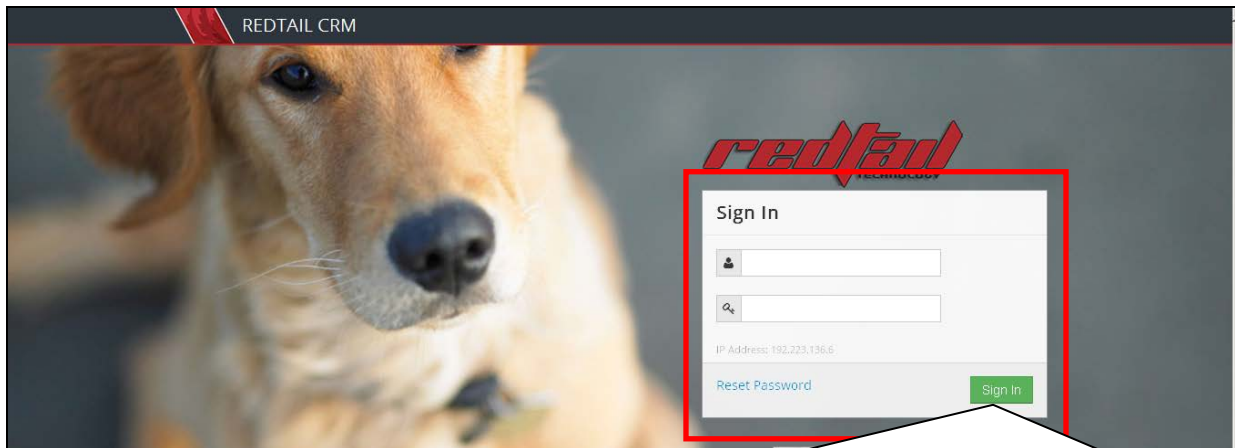
Fidelity WealthCentral[®] Account Opening/Transfer of Assets Tool Integration with Redtail Technology, LLC's CRM System

- + • Helps to improve your experience with the Account Opening/Transfer of Assets tool by providing the ability to use your own customer data stored in Redtail Technology, LLC's CRM system.
- Minimizes the need to rekey customer data, which helps to drive down clerical errors resulting in NIGOs.

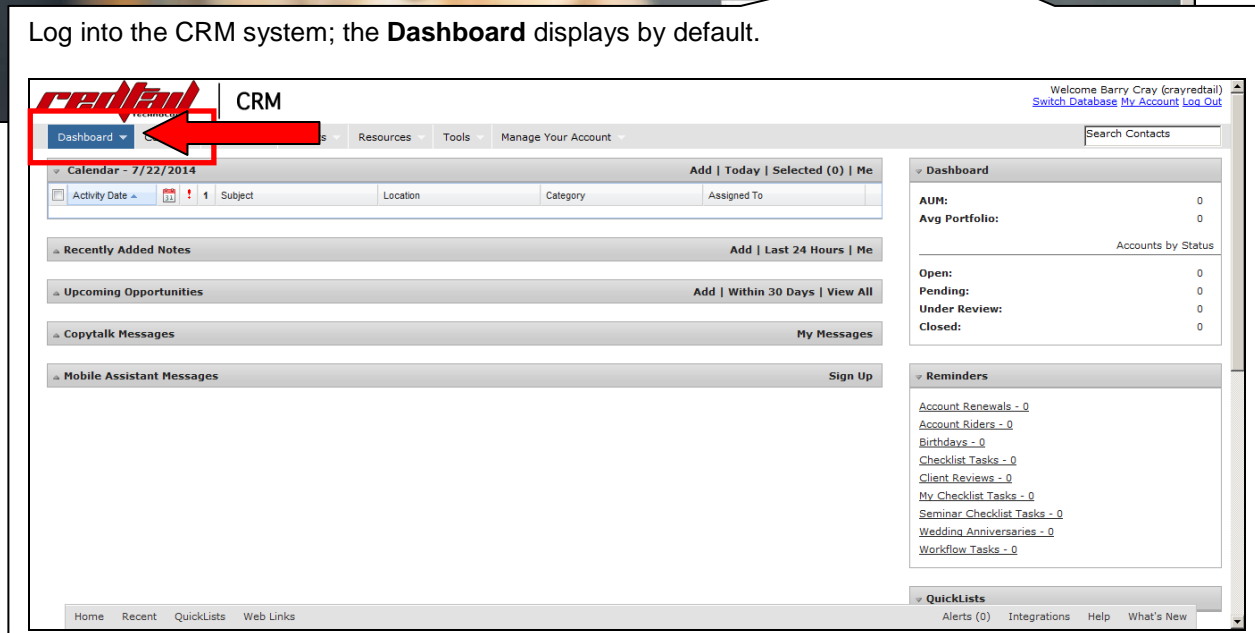


NOTE: If the Account Opening/Transfer of Assets Tool does not display, check that pop-ups are enabled. For additional information on this process, please see the Fidelity WealthCentral Browser Support document. You can find this document in the **System Requirements and Security** section of the Fidelity WealthCentral page in the Products and Services Library (**Resources > Product and Services Library > Tools & Technology > Fidelity WealthCentral**) or via the **document** link on the Fidelity WealthCentral login screen.

We integrated the Account Opening/Transfer of Assets tool with Redtail Technology, LLC's CRM system to aid in customer pre-fill of the forms.



Log into the CRM system; the **Dashboard** displays by default.



Use **Contacts A-Z** to locate the individual for whom you want to open the new account and click the associated link to display information for the selected contact.

Welcome Barry Cray (crayredtail) [Switch Database](#) [My Account](#) [Log Out](#)

Dashboard | Calendar | Contacts | **Contact Overview** | Reports | Resources | Tools | Manage Your Account | Search Contacts

Basic Information Edit | Change Photo

Ms. Karen Erickson
Vice President of Marketing at ABC Company, Inc.

Open Activities

Recent Notes

Email History

Linked Opportunities

Family

Memberships

Home Recent QuickLists Web Links

Contact Card

Phone Numbers: [add](#) | [history](#)
home (239) 463-1111

Internet Addresses: [add](#) | [history](#)
email 1 karenerickson@abccompany.com

Physical Addresses: [add](#) | [history](#)
home 22 Simeon Street
Fort Myers Beach, FL 33931

Social Media: [add](#) | [history](#)

Contact Details Edit

Dashboard

Important Info Edit

User Defined Fields Add

Integrations | Help | What's New

Integrations

- goalgamiPro
- Ph Single Sign On
- ho Laser App Software
- Send To
- Int MarketingLibrary
- em Create New Document
- Ph Single Sign On
- ho Morningstar Advisor Workstation
- Send To
- Fidelity WealthCentral**
- Set Up New Account**
- Send To
- Redtail Email

A pop-up screen displays so you can add up to seven additional account holders.

Select Additional Holders ✕

Up to seven holders can be added to this account by selecting their name(s) below. To help set up the account, the additional holder's personal data will be pre-populated in the new account.

Add

Holder Name	Date of Birth	Relationship
Karen Erickson	6/20/1961	Primary Owner

Continue or Cancel

Clicking the **Continue** button brings you to Fidelity WealthCentral. If you are not already logged in, the login screen displays so you can do so.

Fidelity WealthCentral

Log In to WealthCentral

User ID

Remember my User ID

PIN

[Forgot/Reset My Pin](#)

Log In

If you are not a client of Fidelity Investments, please visit our public site at FWS.fidelity.com

Please refer to the following [document](#) for information regarding system requirements and basic browser troubleshooting steps.

If you experience any issues, please call 1-800-523-5518 or contact your Administrator.

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Fidelity Institutional Wealth Services **Fidelity**

Account Header

Separately Managed Account

Use G Number G00000000 [Change/Add additional](#)

Registration*

Prefill Data From [1 Redtail Contact\(s\)](#)

The Account Opening/Transfer of Assets tool displays automatically and indicates the form will be pre-filled with data from the selected Redtail contacts. Click the **<n> Redtail Contact(s)** link to display a pop-up containing the contacts you chose. If there is more than one contact, you can reorder the entries in the list; the first entry is designated as the **Primary Account Holder**.

Redtail Contact(s)

Name	SSN/TIN
Erickson, Karen	

[Change Order](#)

Account Header

Separately Managed Account

Use G Number G00000000 [Change/Add additional](#)

Registration*

Funding Method*

Prefill Data From [1 Redtail Contact\(s\)](#)

Make your Account Header selections, and then click the **Continue and Save** button. Confirm your selections on the pop-up screen that displays.

Confirm Details of Individual

You have chosen:

- Individual registration
- Fund this account through - Transfer of Assets
- Pre-fill with contact(s) from Redtail

The **Account Permanent Address** and **Personal Information** sections populate with the information from the CRM system.

Account Opening - Windows Internet Explorer

Account Header

G Number G00000000 Registration Individual
 DTC Funding Method Transfer of Assets
 Confirmation Number CNF11025925072214

Account Permanent Address | Personal Information | Delivering Account | Account Characteristics

Account Permanent Address

Address Type* Domestic
 Address Line 1* 22 Simeon Street
 Address Line 2
 City* Fort Myers Beach State* FLORIDA ZIP Code* 33931
 Mailing Address Use this address Add Personal Mailing Address

Personal Information

Delivering Account

Account Characteristics

Required fields left blank will be completed by the end-signers of this application.

Validate

Welcome Barry Cray (crayredtail)
[Switch Database](#) [My Account](#) [Log Out](#)

Search Contacts

Contact Card

Phone Numbers: (add | history)
 home (239) 463-1111

Internet Addresses: (add | history)
 email 1 karenerickson@abccompany.com

Physical Addresses: (add | history)
 home 22 Simeon Street
 Fort Myers Beach, FL 33931

Social Media: (add | history)

Account Opening - Windows Internet Explorer

Account Header

G Number G00000000 Registration Individual
 DTC Funding Method Transfer of Assets
 Confirmation Number CNF11025925072214

Account Permanent Address | Personal Information | Delivering Account | Account Characteristics

Personal Information

Primary Owner

Entity Type* P - Person
 First Name* Karen Middle Name Last Name* Erickson
 SSN TIN Date of Birth* 06/20/1961
 Citizenship* UNITED STATES Tax Residence Status* 01 - US Citizen Country of Tax Residence* UNITED STATES

Address

Permanent Address of Owner Same as Account Permanent Address

Address Type* Domestic
 Address Line 1* 22 Simeon Street
 Address Line 2
 City* Fort Myers Beach State* FLORIDA ZIP Code* 33931
 Mailing Address Use this address Add Personal Mailing Address

Evening Phone 001 2394631111 Day Phone

Email - Please send documentation via email U.S. Mail - Please send the following documents by mail to the above Mailing Address

Welcome Barry Cray (crayredtail)
[Switch Database](#) [My Account](#) [Log Out](#)

Search Contacts

Contact Card

Phone Numbers: (add | history)
 home (239) 463-1111

Internet Addresses: (add | history)
 email 1 karenerickson@abccompany.com

Physical Addresses: (add | history)
 home 22 Simeon Street
 Fort Myers Beach, FL 33931

Social Media: (add | history)

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