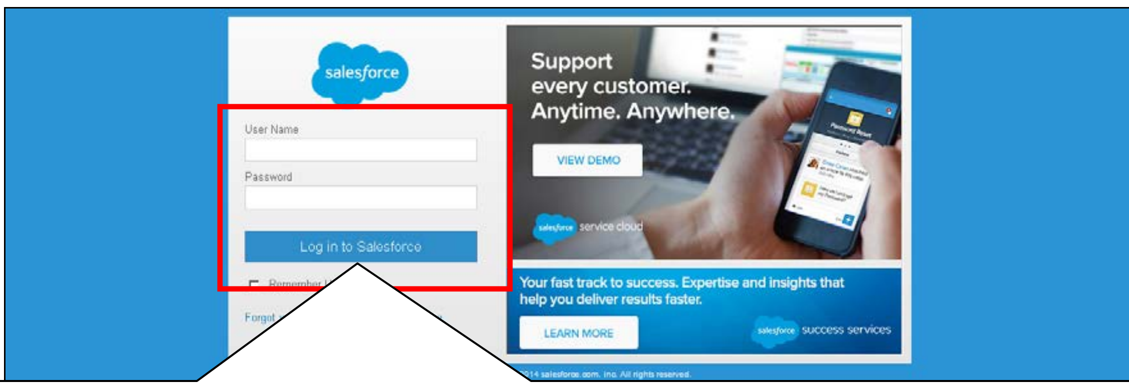
Fidelity WealthCentral®
Account Opening/Transfer of Assets Tool
Integration with Skience CRM

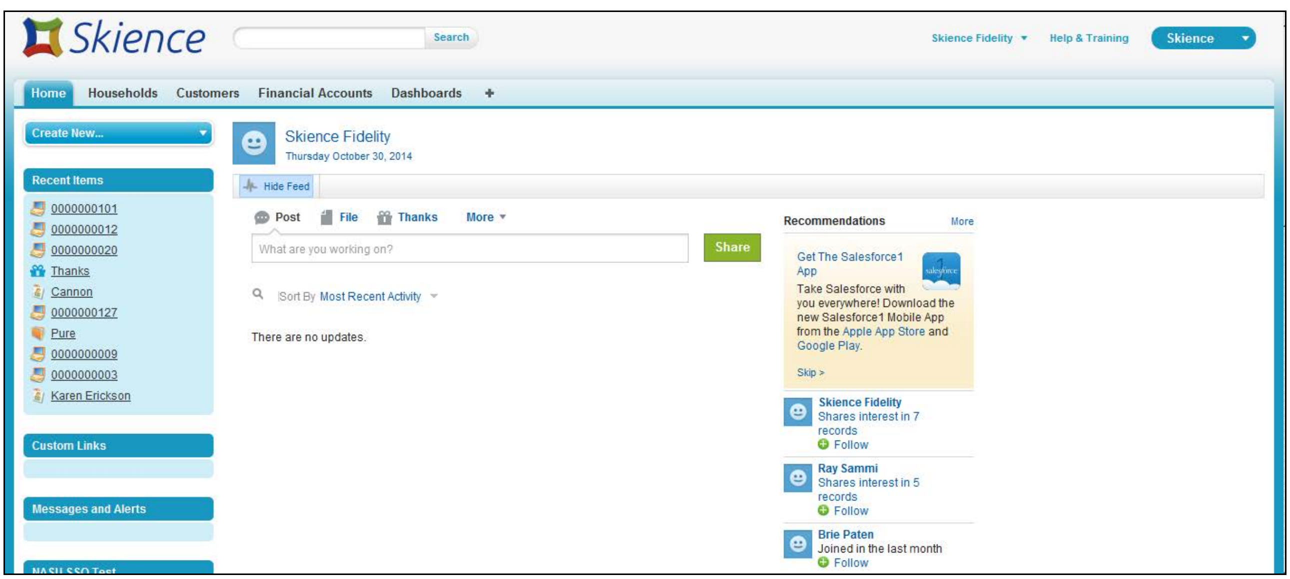
- Helps to improve your experience with the Account Opening/Transfer of Assets tool by providing the ability to use your own customer data stored in Skience CRM.
- Minimizes the need to rekey customer data, which helps to drive down clerical errors resulting in NIGOs.

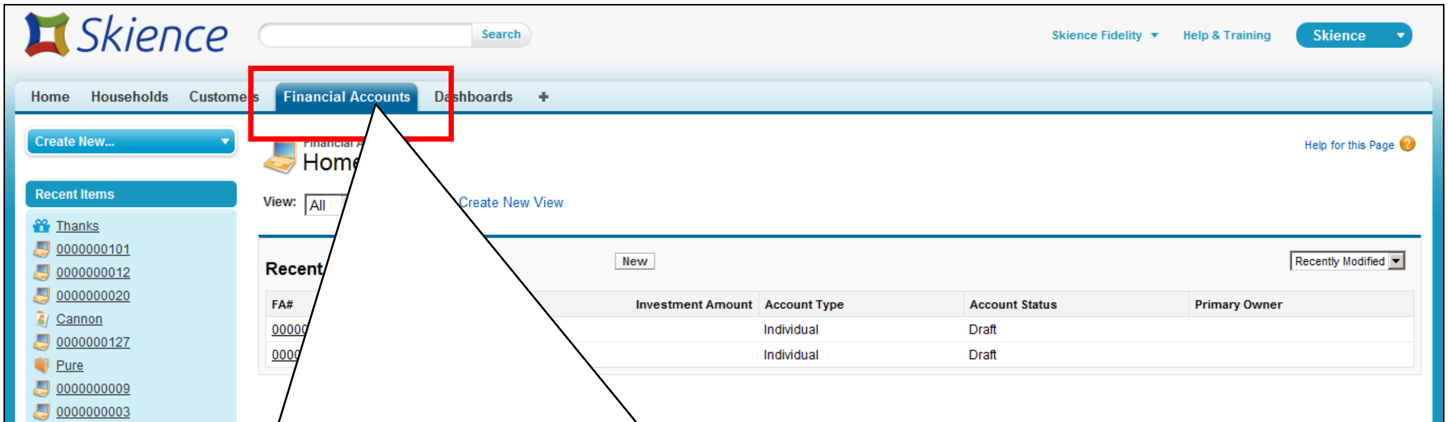
NOTE: If the Account Opening/Transfer of Assets Tool does not display, check that pop-ups are enabled. For additional information on this process, please see the Fidelity WealthCentral Browser Support document. You can find this document in the **System Requirements and Security** section of the Fidelity 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 Skience CRM to aid in customer pre-fill of Fidelity forms.

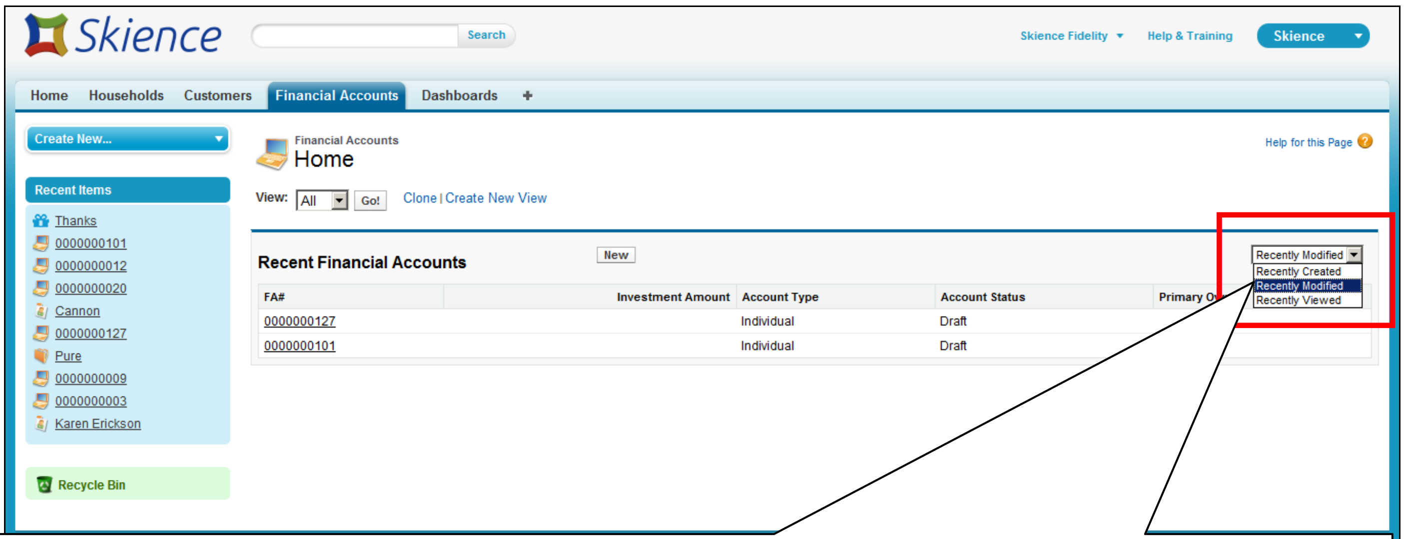


Log into Skience CRM; the **Home Tab** displays by default.

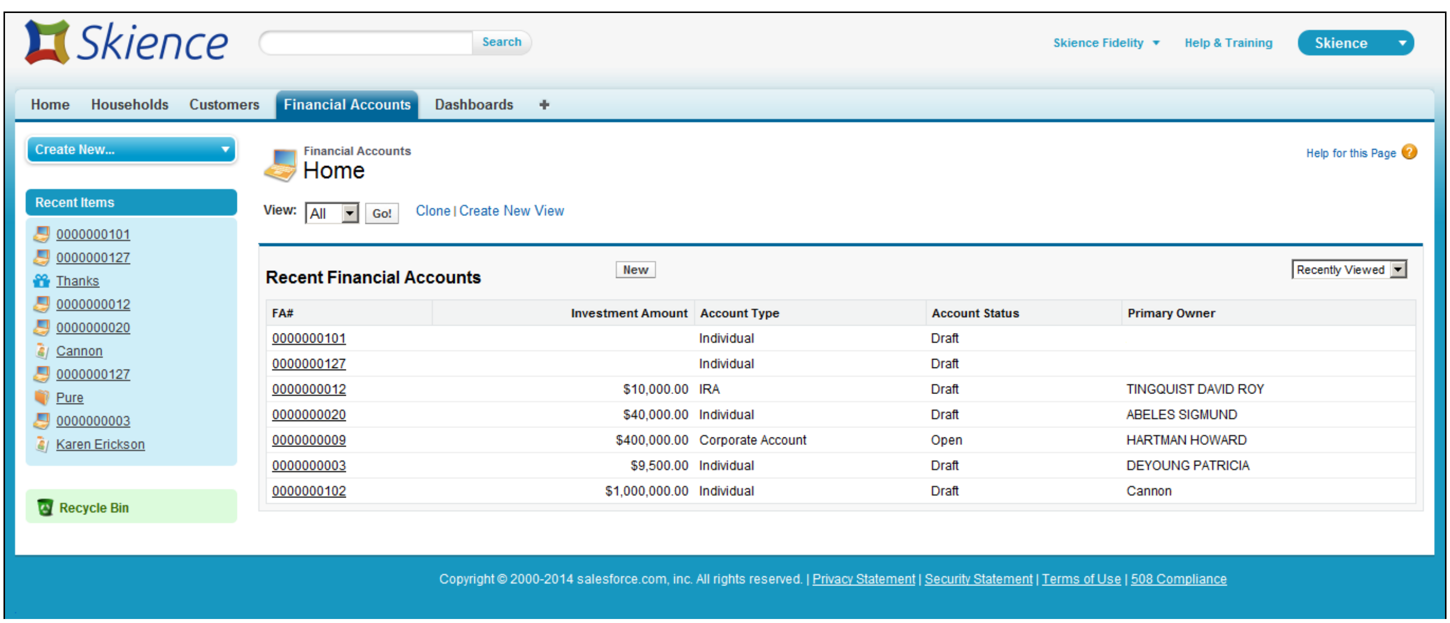


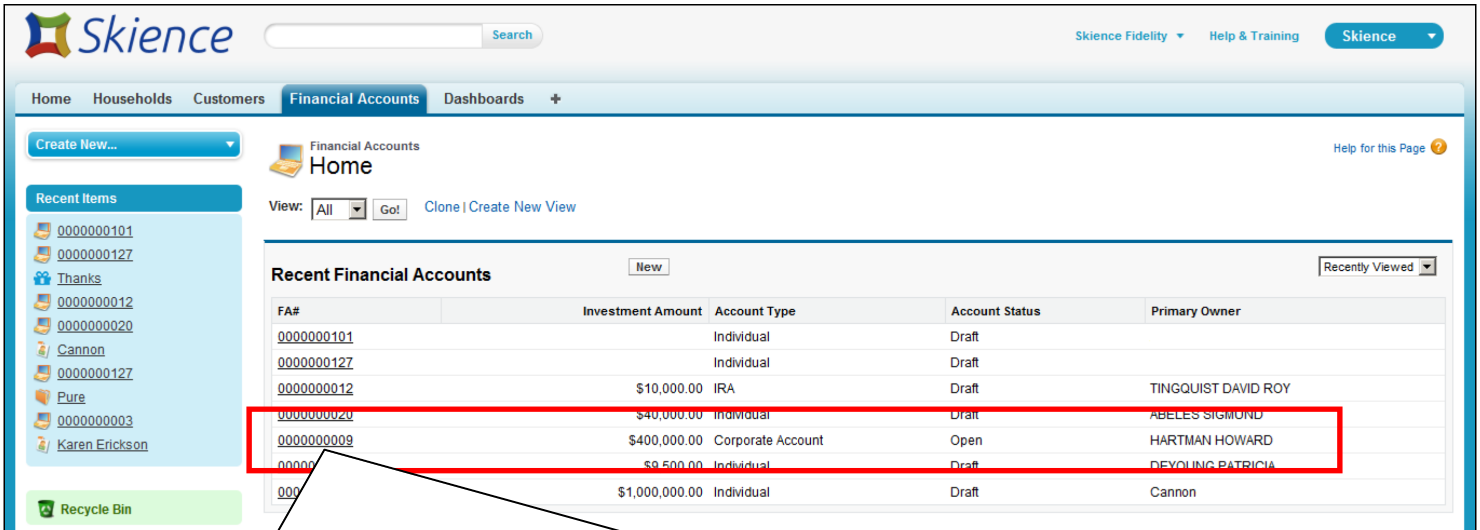


Click the **Financial Accounts Tab** to locate the contact for which you want to open the new account.

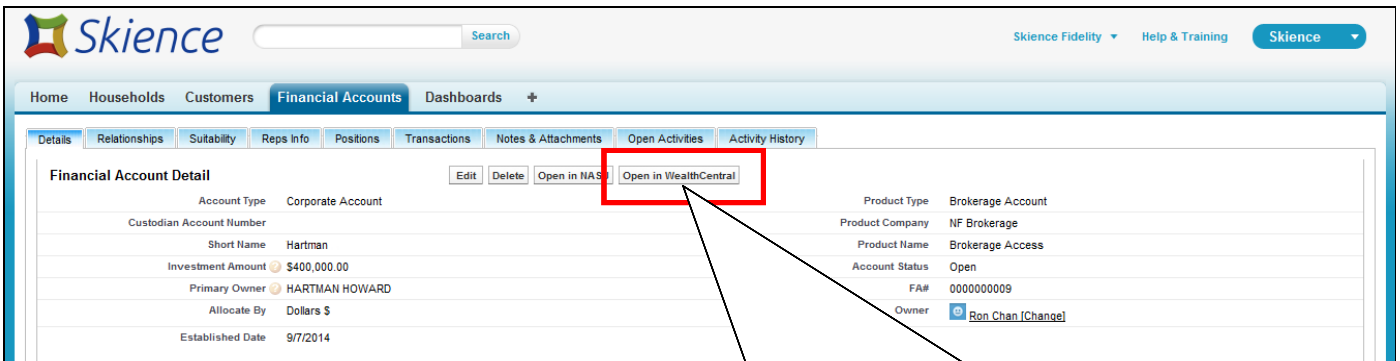


The drop-down enables you to display contacts that were **Recently Created**, **Recently Modified** (the default), or **Recently Viewed**.

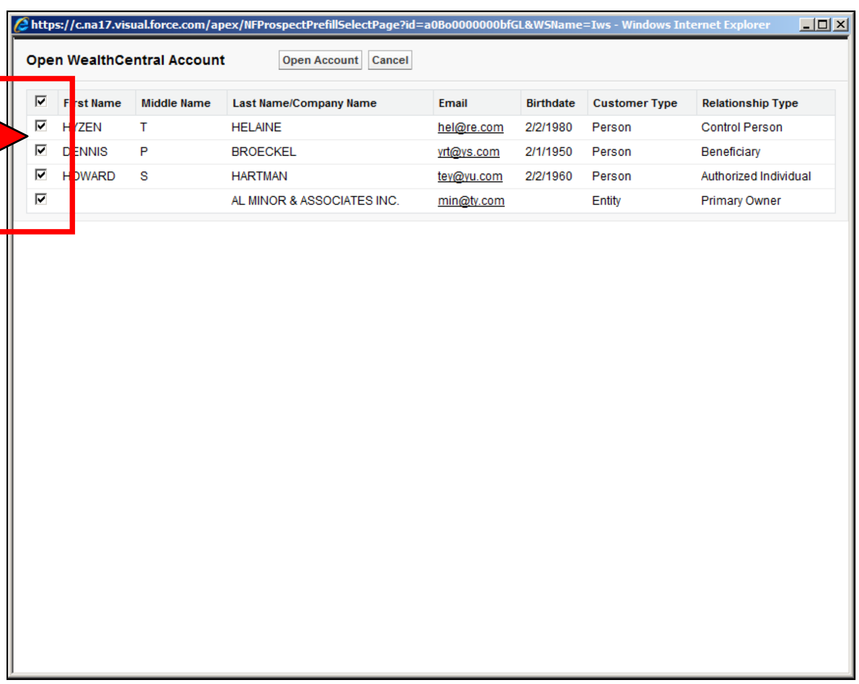


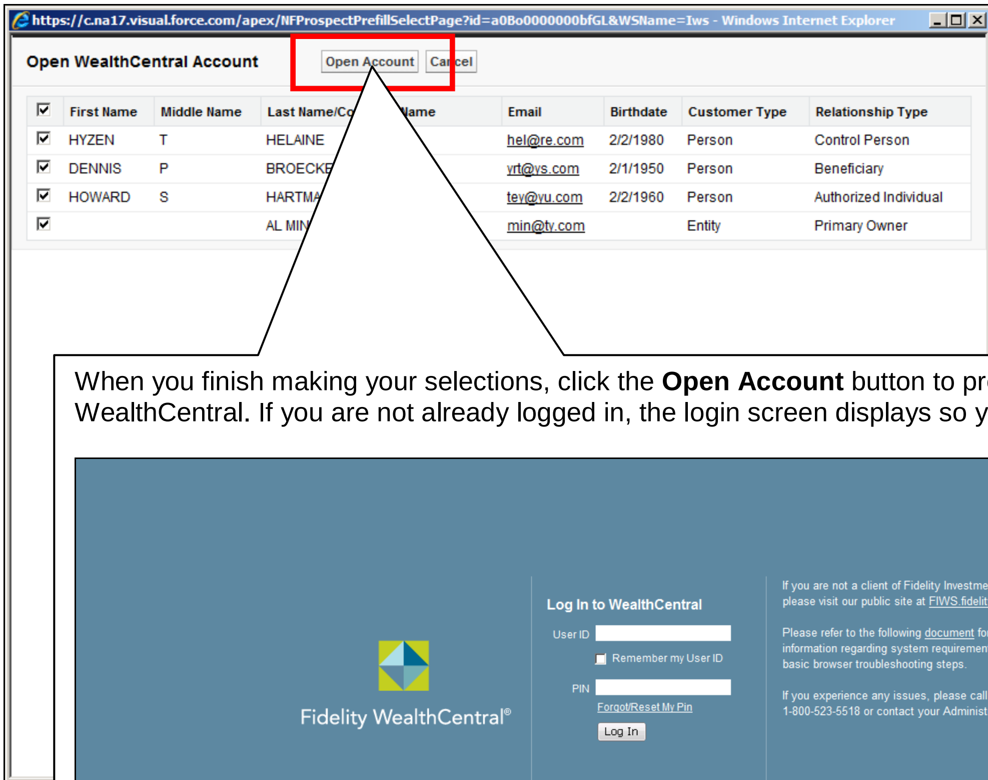


When you find the contact, click the associated link to display information about your selection. Then, click the **Open in WealthCentral** button on the **Details Tab**.

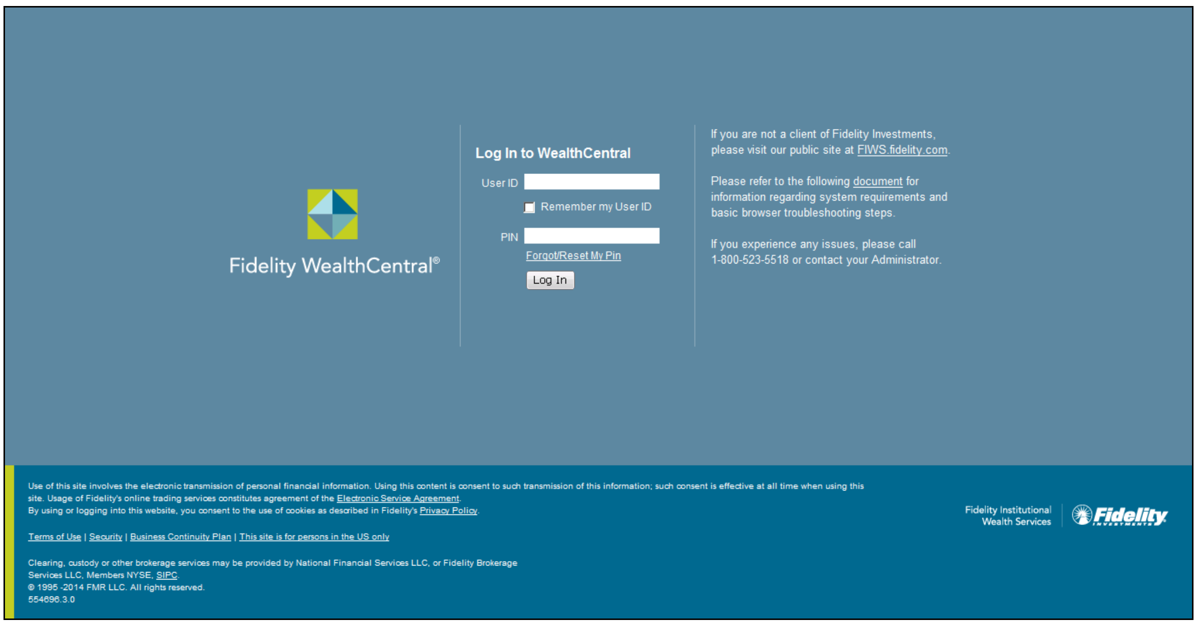


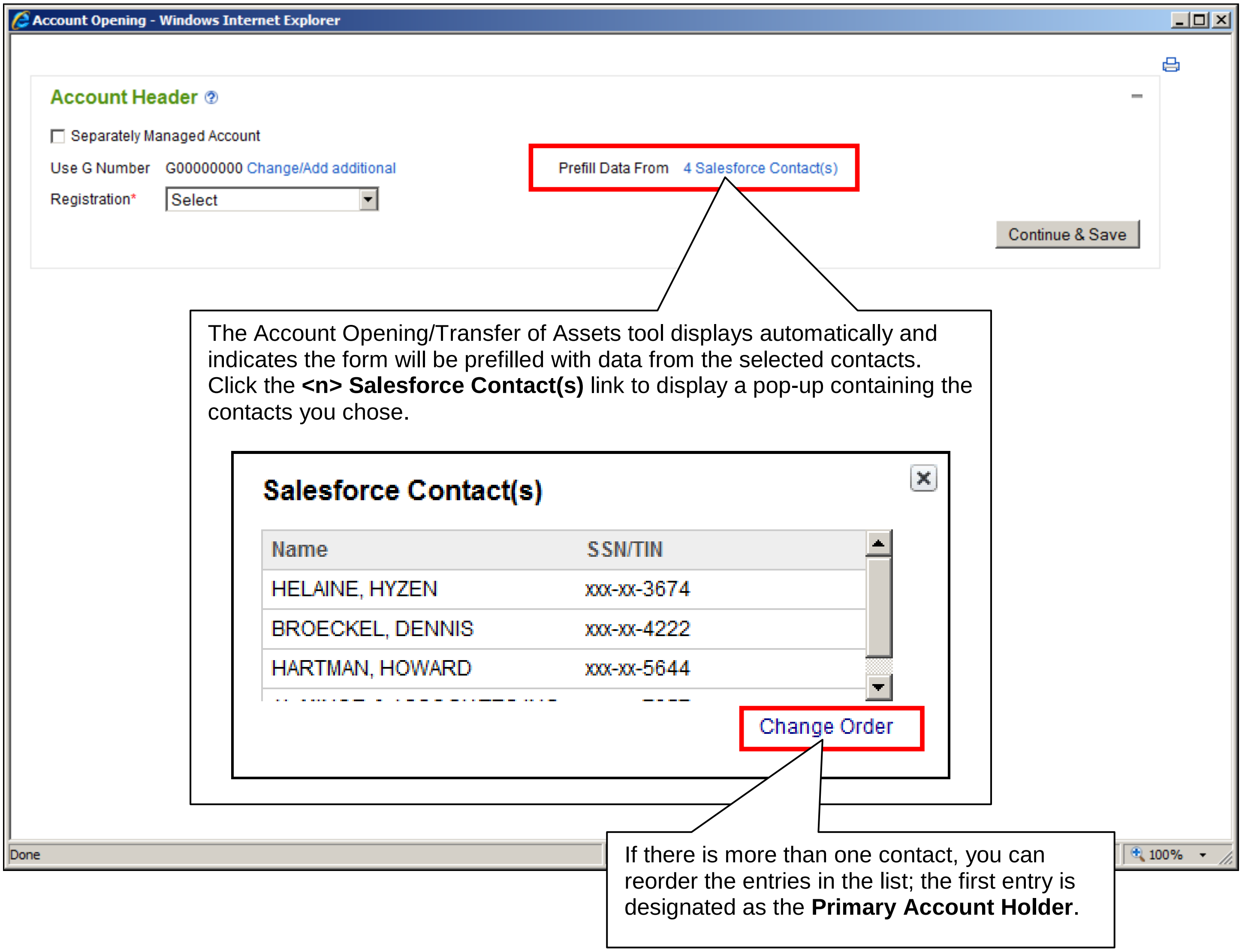
A pop-up screen displays so you can select additional account holders.





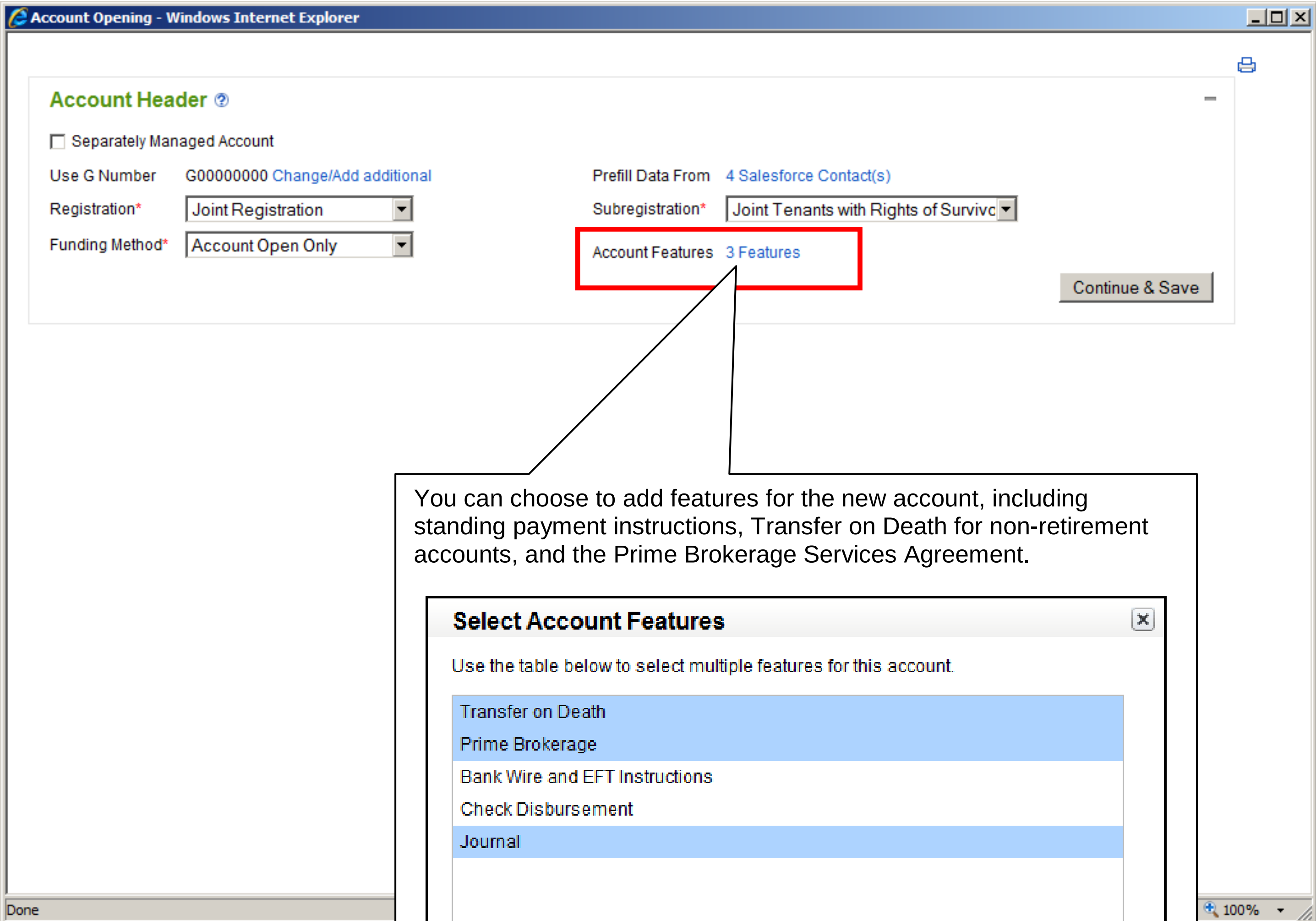
When you finish making your selections, click the **Open Account** button to proceed to Fidelity WealthCentral. If you are not already logged in, the login screen displays so you can do so.





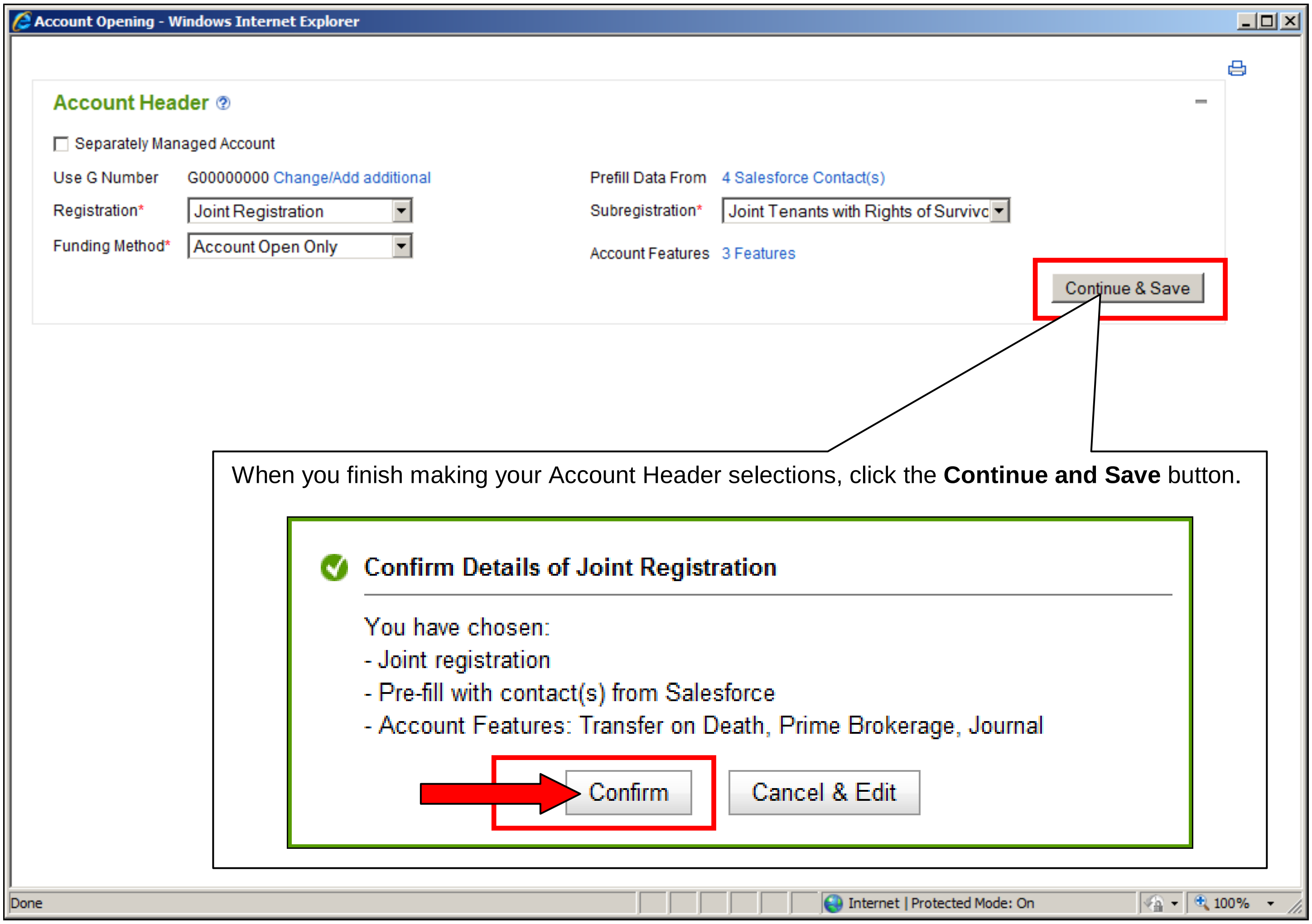
The Account Opening/Transfer of Assets tool displays automatically and indicates the form will be prefilled with data from the selected contacts. Click the **<n> Salesforce Contact(s)** link to display a pop-up containing the contacts you chose.

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**.



You can choose to add features for the new account, including standing payment instructions, Transfer on Death for non-retirement accounts, and the Prime Brokerage Services Agreement.

Click the **Select** button to close the pop-up. The number of Account Features you selected displays in the Account Header.


Account Opening - Windows Internet Explorer
Account Header
Separately Managed Account
Use G Number
G00000000 Change/Add additional
Prefill Data From
4 Salesforce Contact(s)
Registration*
Joint Registration
Subregistration*
Joint Tenants with Rights of Survivc
Funding Method*
Account Open Only
Account Features
3 Features
Continue & Save
When you finish making your Account Header selections, click the **Continue and Save** button.
Confirm Details of Joint Registration
You have chosen:
- Joint registration
- Pre-fill with contact(s) from Salesforce
- Account Features: Transfer on Death, Prime Brokerage, Journal
Confirm
Cancel & Edit
Done
Internet | Protected Mode: On
100%

The appropriate sections and fields populate with the information from your CRM system.