

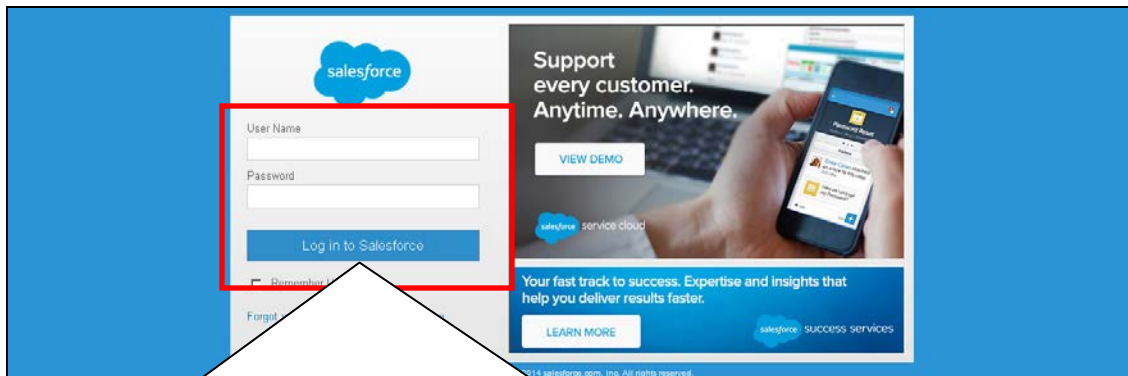
Fidelity WealthCentral[®] Account Opening/Transfer of Assets Tool Integration with Skience CRM

- ✚ • 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.

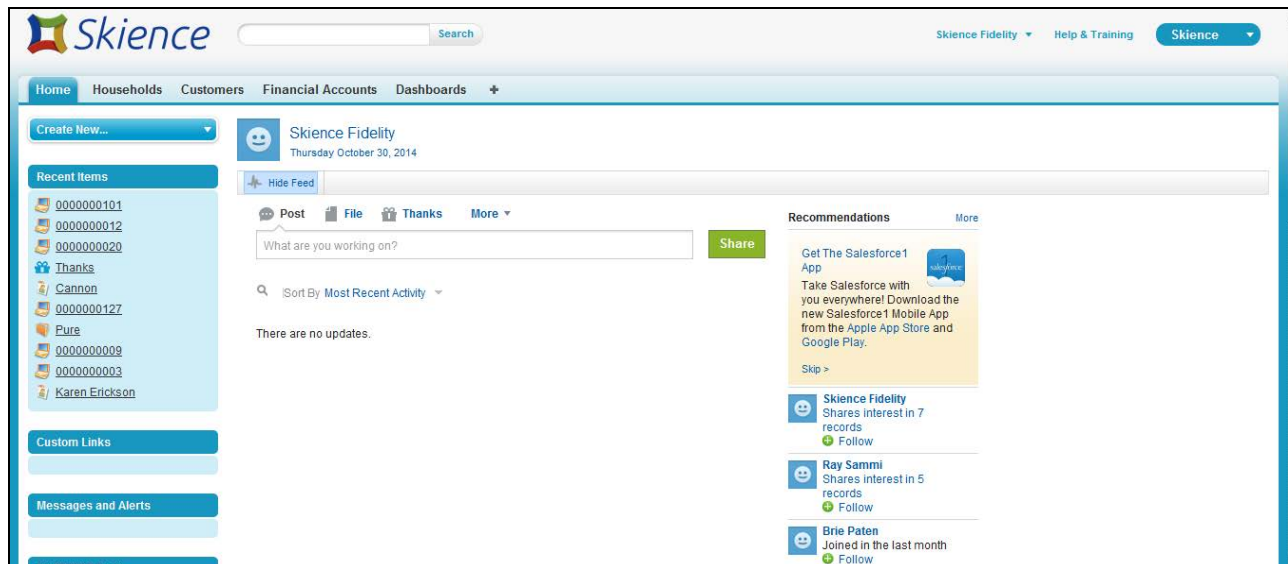


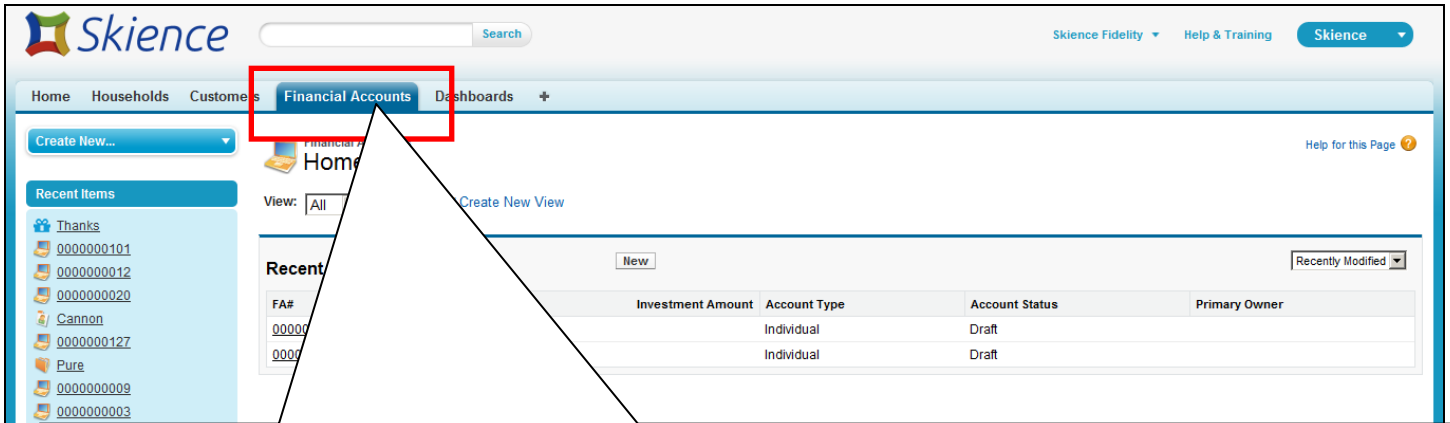
NOTE: If the Account Opening/Transfer of Assets Tool does not display, check that pop-ups are enabled. For additional information on this process, please see the Fidelity WealthCentral Browser Support document. You can find this document in the **System Requirements and Security** section of the Fidelity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

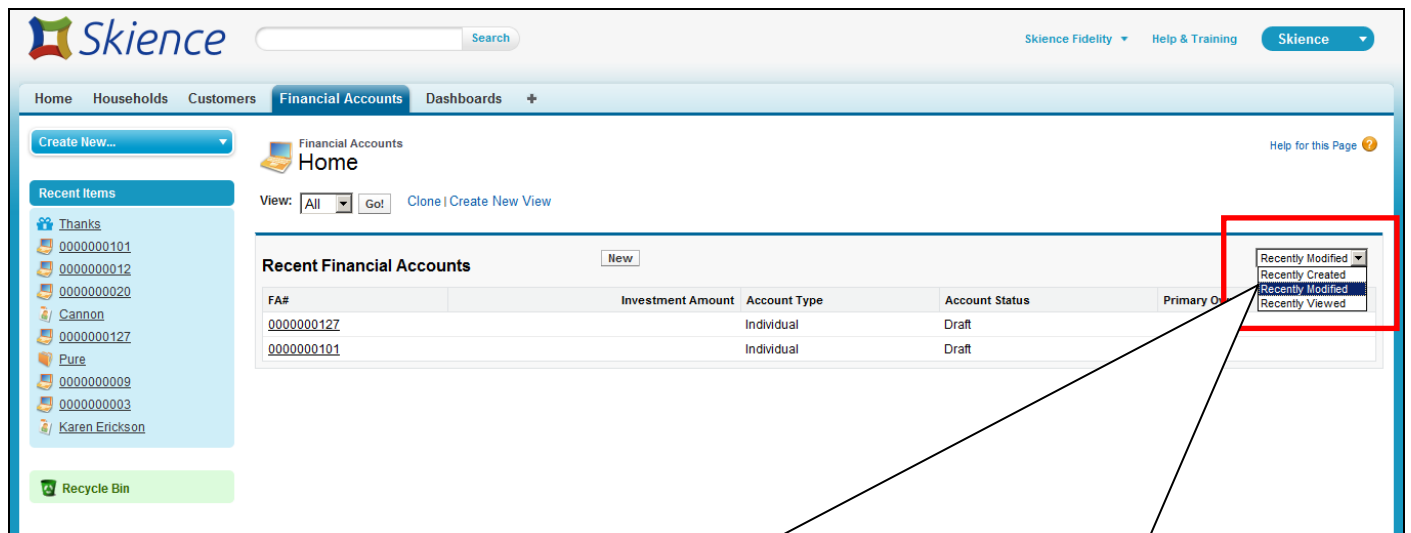


Log into Skience CRM; the **Home Tab** displays by default.

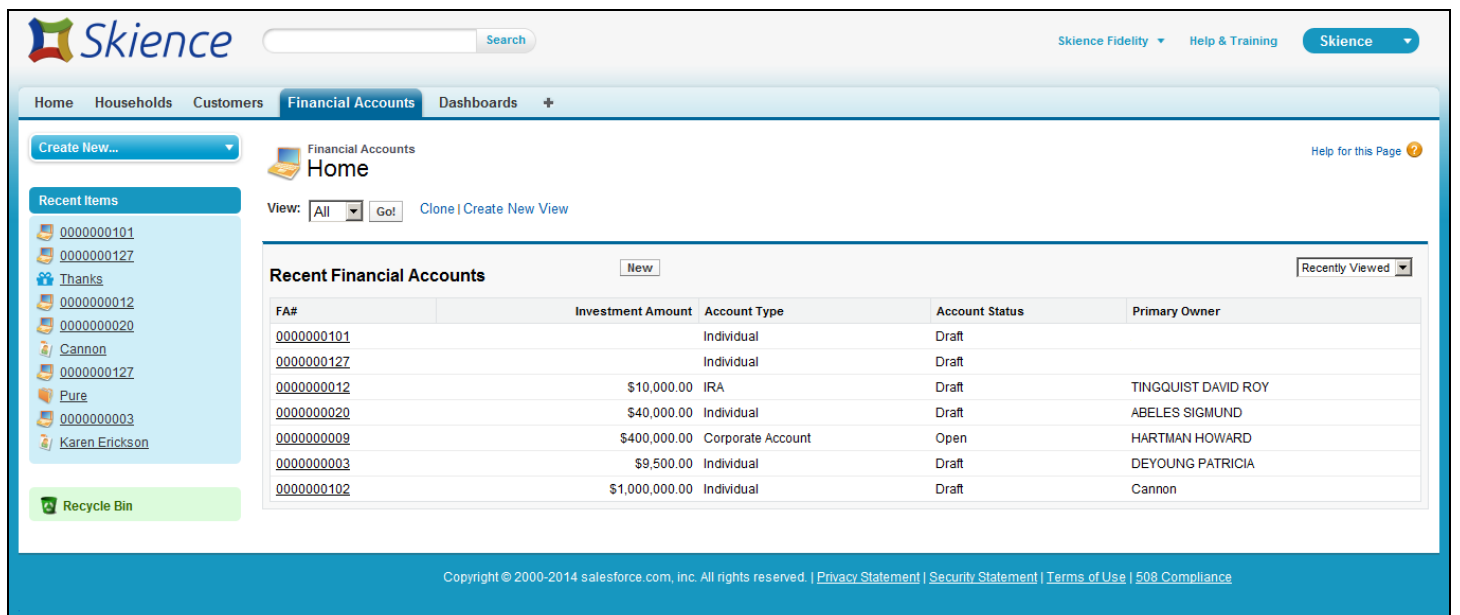




Click the **Financial Accounts Tab** to locate the contact for which you want to open the new account.



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



Create New...

Recent Items

- 0000000101
- 0000000127
- Thanks
- 0000000012
- 0000000020
- Cannon
- 0000000127
- Pure
- 0000000003
- Karen Erickson

Recycle Bin

Financial Accounts Home

View: All Go! [Clone](#) | [Create New View](#)

Recent Financial Accounts

FA#	Investment Amount	Account Type	Account Status	Primary Owner
0000000101		Individual	Draft	
0000000127		Individual	Draft	
0000000012	\$10,000.00	IRA	Draft	TINGQUIST DAVID ROY
0000000020	\$40,000.00	Individual	Draft	ABELES SIGMUND
0000000009	\$400,000.00	Corporate Account	Open	HARTMAN HOWARD
0000000000	\$9,500.00	Individual	Draft	DEVOLING PATRICIA
0000000000	\$1,000,000.00	Individual	Draft	Cannon

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**.

Financial Account Detail

[Edit](#) [Delete](#) [Open in NAS](#) **[Open in WealthCentral](#)**

Account Type	Corporate Account	Product Type	Brokerage Account
Custodian Account Number		Product Company	NF Brokerage
Short Name	Hartman	Product Name	Brokerage Access
Investment Amount	\$400,000.00	Account Status	Open
Primary Owner	HARTMAN HOWARD	FA#	0000000009
Allocate By	Dollars \$	Owner	Ron Chan [Change]
Established Date	9/7/2014		

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

Open WealthCentral Account


First Name	Middle Name	Last Name/Company Name	Email	Birthdate	Customer Type	Relationship Type
<input checked="" type="checkbox"/>	H	ZEN T HELAINE	hel@re.com	2/2/1980	Person	Control Person
<input checked="" type="checkbox"/>	DENNIS	P BROECKEL	vt1@vs.com	2/1/1950	Person	Beneficiary
<input checked="" type="checkbox"/>	HOWARD	S HARTMAN	tev@vu.com	2/2/1960	Person	Authorized Individual
<input checked="" type="checkbox"/>		AL MINOR & ASSOCIATES INC.	min@tv.com		Entity	Primary Owner

https://c.na17.visual.force.com/apex/NFProspectPreFillSelectPage?id=a08o000000bfGL&WSName=Iws - Windows Internet Explorer

Open WealthCentral Account

<input checked="" type="checkbox"/>	First Name	Middle Name	Last Name/Company Name	Email	Birthdate	Customer Type	Relationship Type
<input checked="" type="checkbox"/>	HYZEN	T	HELAINÉ	hel@re.com	2/2/1980	Person	Control Person
<input checked="" type="checkbox"/>	DENNIS	P	BROECKE	vt@vs.com	2/1/1950	Person	Beneficiary
<input checked="" type="checkbox"/>	HOWARD	S	HARTMA	tev@vu.com	2/2/1960	Person	Authorized Individual
<input checked="" type="checkbox"/>			AL MIN	min@tv.com		Entity	Primary Owner

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.



Fidelity WealthCentral®

Log In to WealthCentral

User ID

Remember my User ID

PIN

[Forgot/Reset My Pin](#)

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

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

Name	SSN/TIN
HELAINE, HYZEN	xxx-xx-3674
BROECKEL, DENNIS	xxx-xx-4222
HARTMAN, HOWARD	xxx-xx-5644

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**.

Account Opening - Windows Internet Explorer

Account Header

Separately Managed Account

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

Registration*:

Funding Method*:

Prefill Data From: 4 Salesforce Contact(s)

Subregistration*:

Account Features: 3 Features

Done

100%

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.

Select Account Features

Use the table below to select multiple features for this account.

<input checked="" type="checkbox"/> Transfer on Death
<input checked="" type="checkbox"/> Prime Brokerage
<input type="checkbox"/> Bank Wire and EFT Instructions
<input type="checkbox"/> Check Disbursement
<input checked="" type="checkbox"/> Journal

Note: If you are opening more than one account, you will be asked to provide Journaling and/or Household instructions after setting up the accounts.

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](#)

Registration*:

Funding Method*:

Pre-fill Data From: 4 Salesforce Contact(s)

Subregistration*:

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

Done | Internet | Protected Mode: On | 100%

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

Account Opening - Windows Internet Explorer

Account Header Print ?

G Number G00000000 Registration Joint Registration * Required Field
DTC Funding Method Account Open Only
Confirmation Number CNF11051729103014

[Account Permanent Address](#) | [Personal Information](#) | [Account Characteristics](#) | [Account Features](#)

Account Permanent Address ?

Address Type*

Address Line 1*

Address Line 2

City* State* ZIP Code*

Mailing Address Use this address Add Personal Mailing Address

Mailing Address

Address Type*

Address Line 1*

Address Line 2

City* State* ZIP Code*

Personal Information ?

Account Characteristics ?

Done Internet | Protected Mode: On 100%

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