

Fidelity Financial Forward<sup>®</sup>  
for Universities  
HOW TO GUIDE

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08.14.2023



Fidelity Financial Forward® for Universities  
HOW-TO GET INVESTED



**Fidelity** Bloom<sup>SM</sup>



**INVESTS**



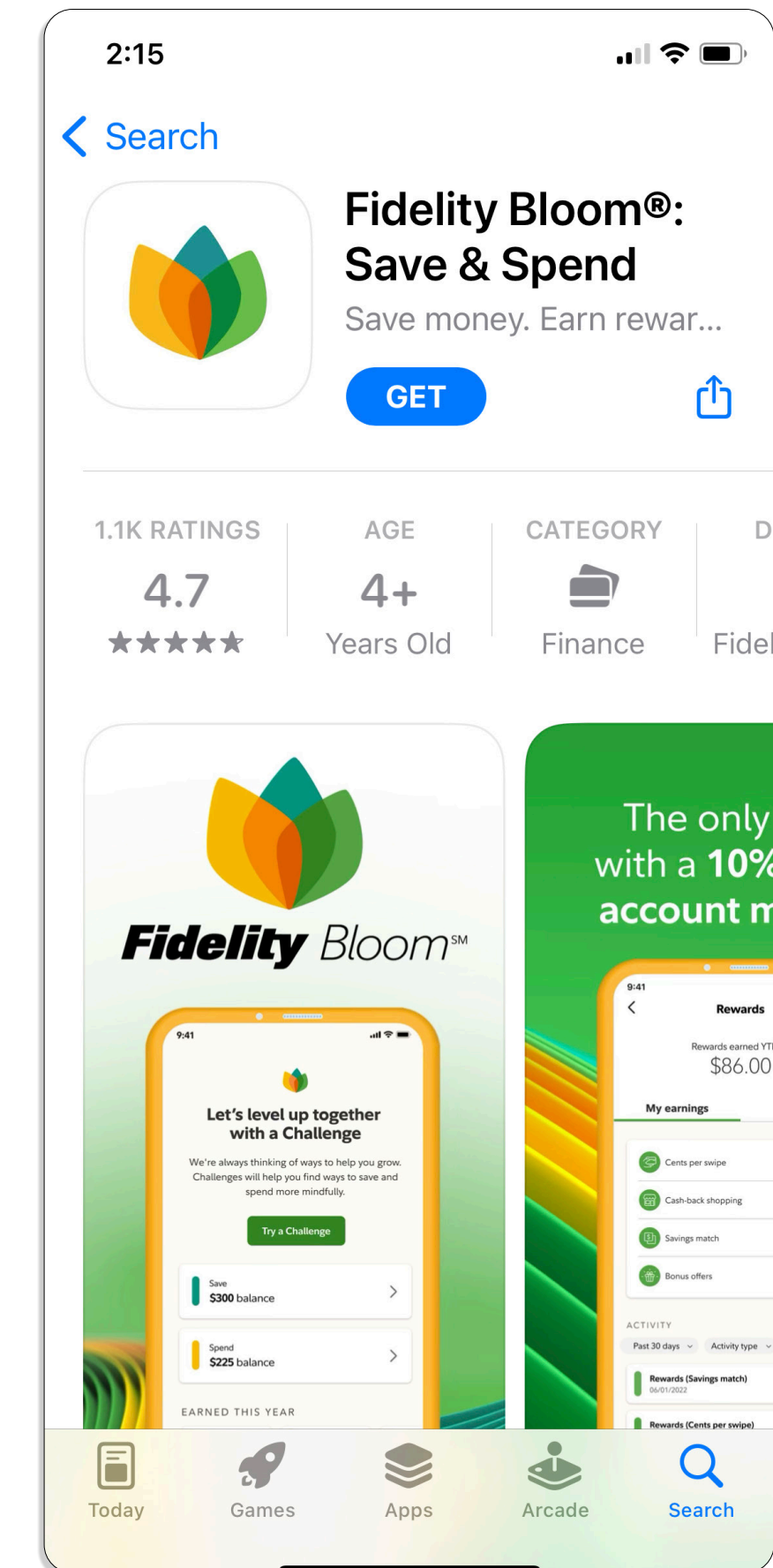
Welcome Wildcats!

From downloading the app to making your first investment, here's your guide to getting started with Fidelity Bloom<sup>®</sup> for UK Invests.



# HOW TO Download the Fidelity Bloom<sup>®</sup> app

- 1 Use your smartphone's camera to scan the QR code or [click this link](#).
- 2 You'll be directed to a custom Fidelity Bloom<sup>®</sup> app store listing.
- 3 Tap "Get" to download the app to your device.



# Open your Fidelity Bloom<sup>®</sup> accounts

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- 1 Launch the app and tap the prompt to get started.
- 2 Provide your personal details to verify your identity.
- 3 Review and accept the terms for your new accounts\*.  
\*You'll open 2 new brokerage accounts: Fidelity Bloom<sup>®</sup> Save and Fidelity Bloom<sup>®</sup> Spend.

## You'll need these items:



### SOCIAL SECURITY NUMBER

We're required to use it to securely verify your identity.



### GOVERNMENT-ISSUED ID

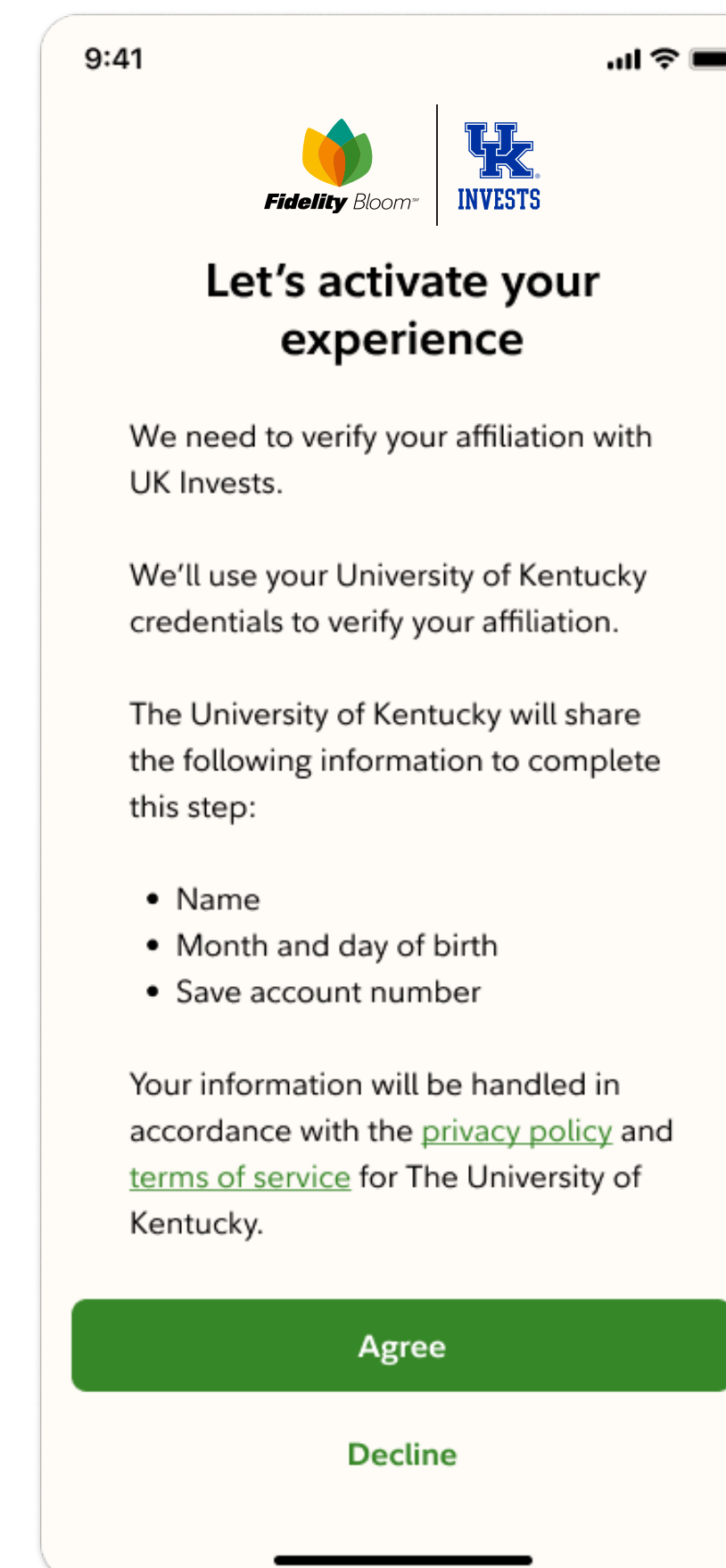
For additional verification, we may ask for details from a driver's license or similar ID.

We recommend providing a personal email address (not the one associated with your school)

A phone number that can receive SMS text messages

# HOW TO Verify your student status

- 1 When prompted, tap to begin the activation of your affiliated experience.
- 2 Tap to allow secure verification by a trusted third party.
- 3 If prompted, provide additional details to verify your identity.

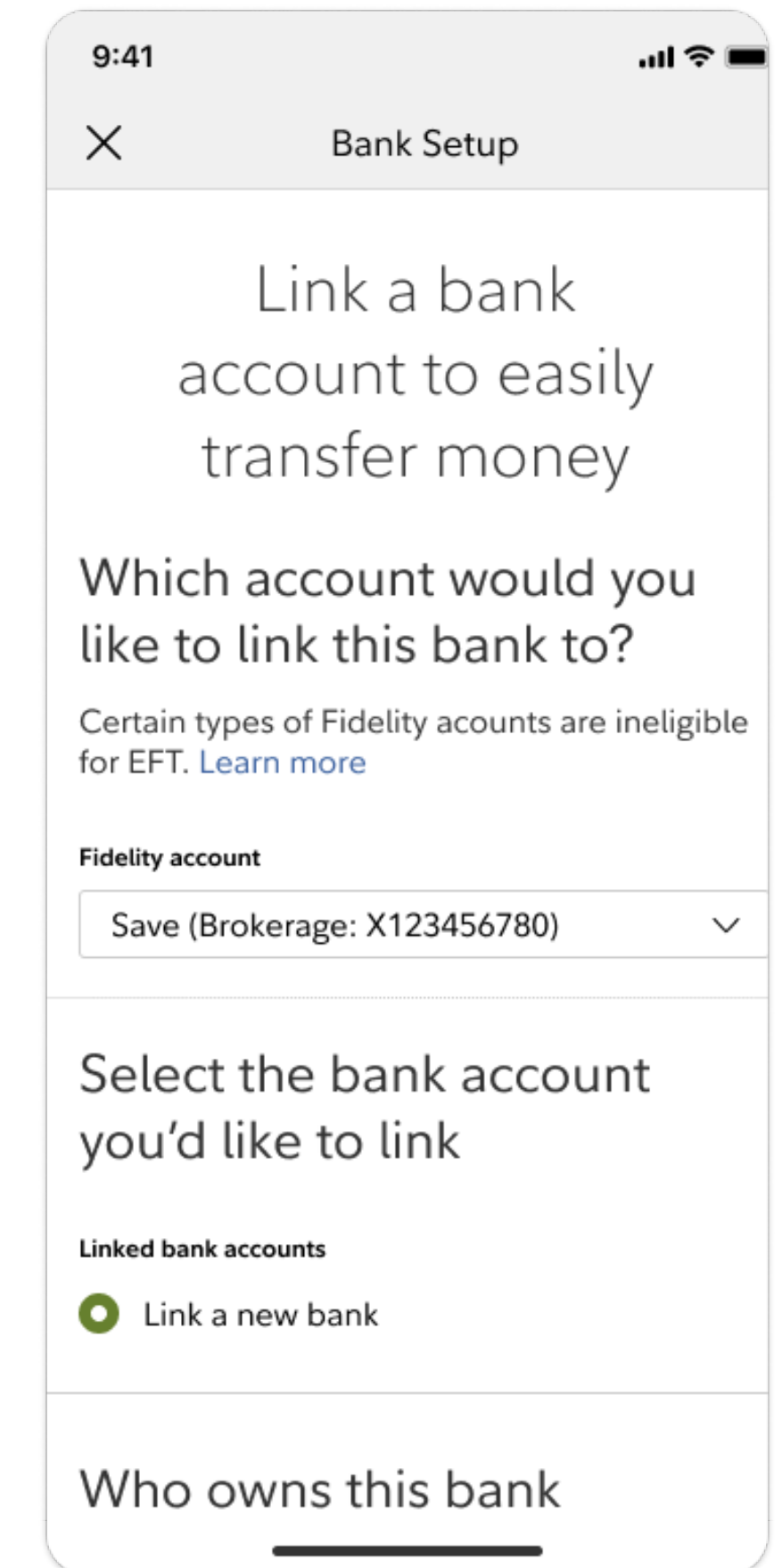
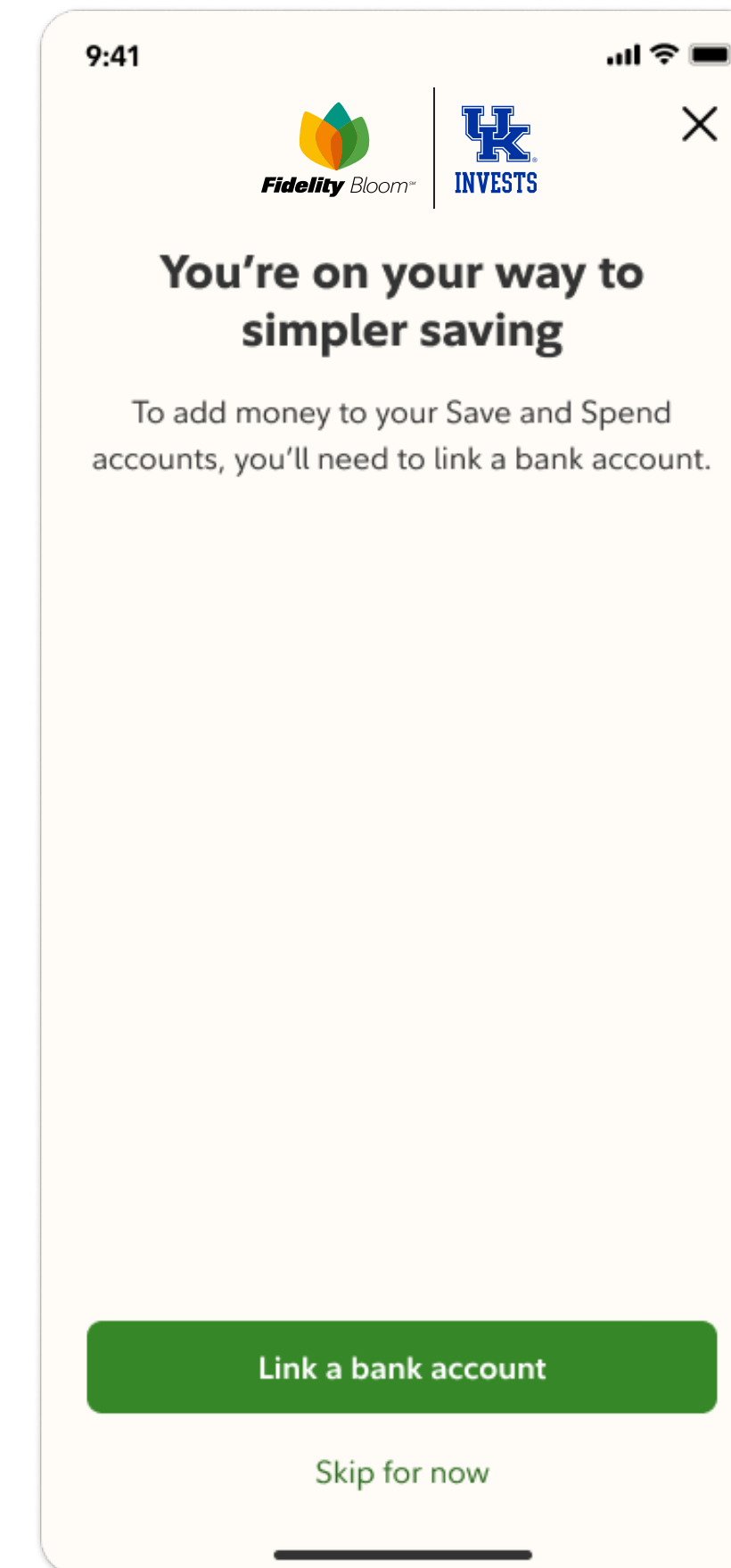
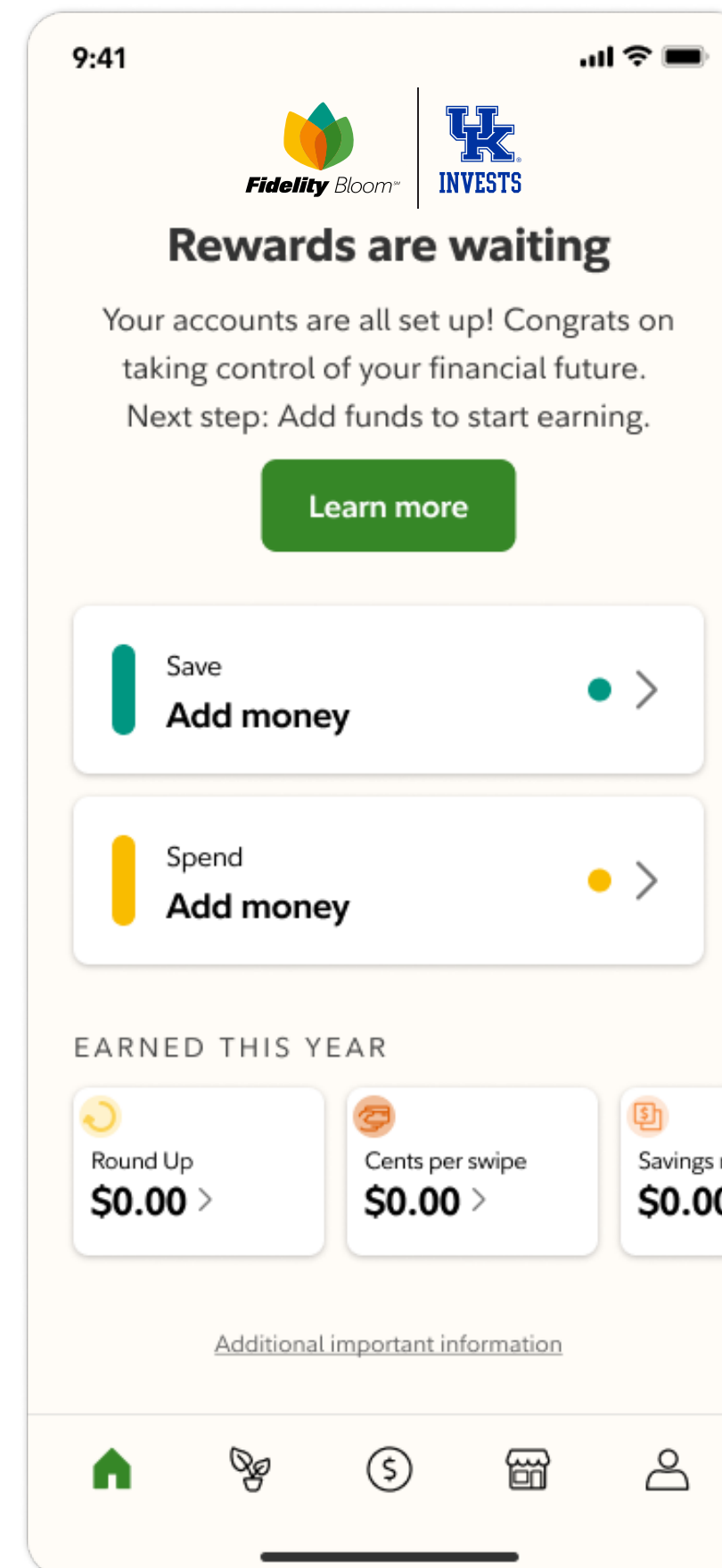


# HOW TO Add money to your Save account

1 Before you can invest in the app you'll need to fund your Save account. From the Home icon, tap the Save account tile.

2 Tap to link a bank account, then follow the prompts.  
*\*You can skip bank linking if you're adding money from an existing Fidelity account.*

3 Choose an amount and frequency to transfer, then follow the prompts to add money to Save.





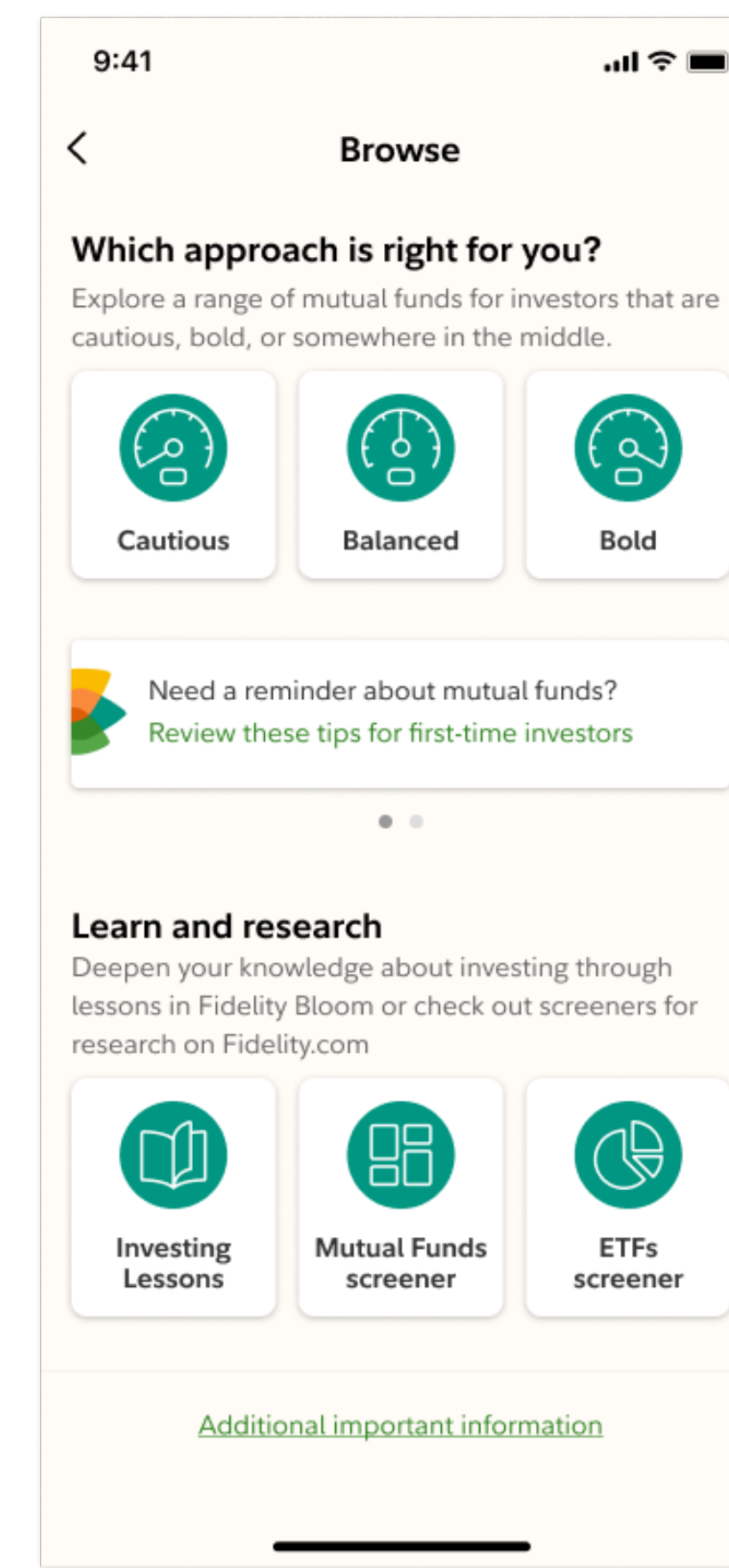
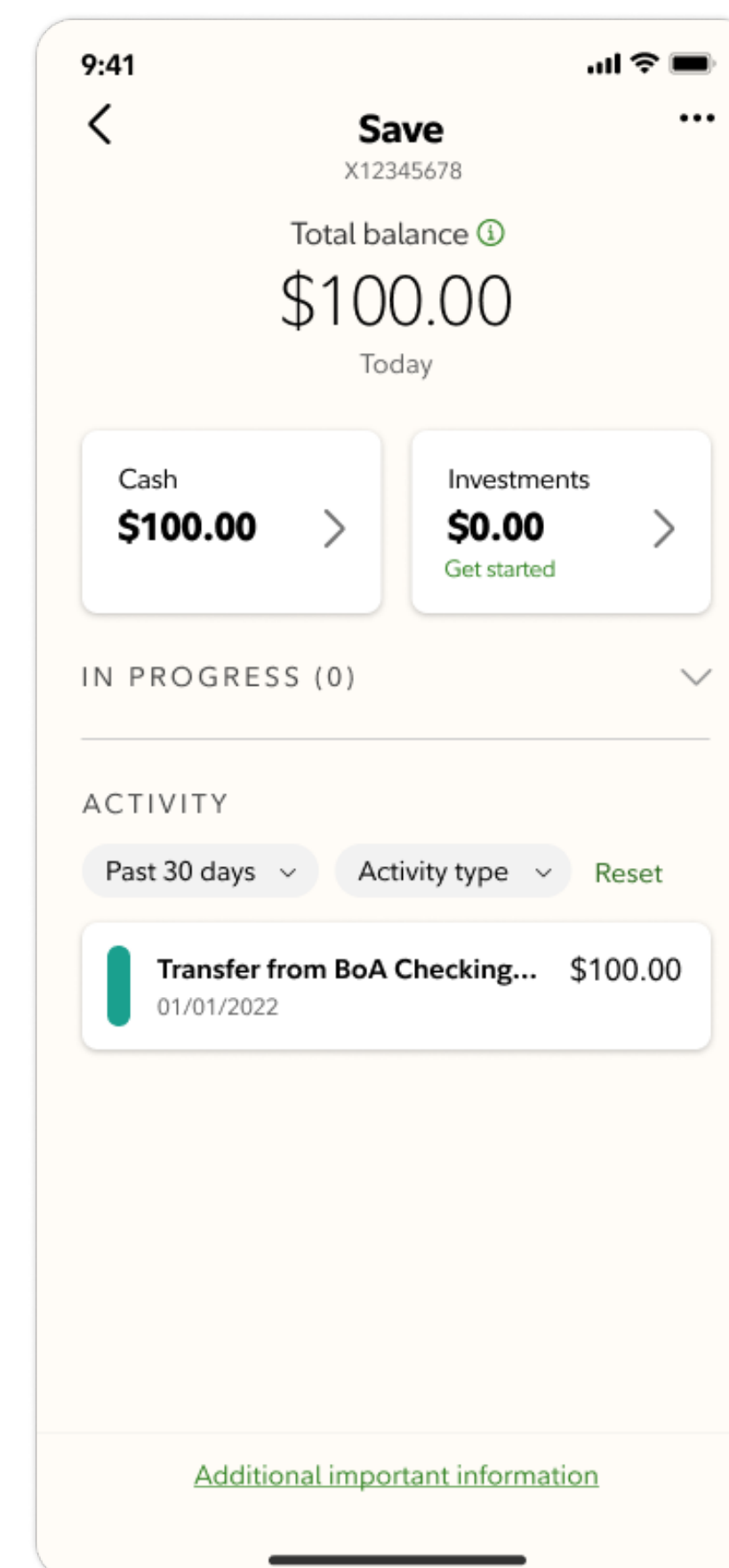
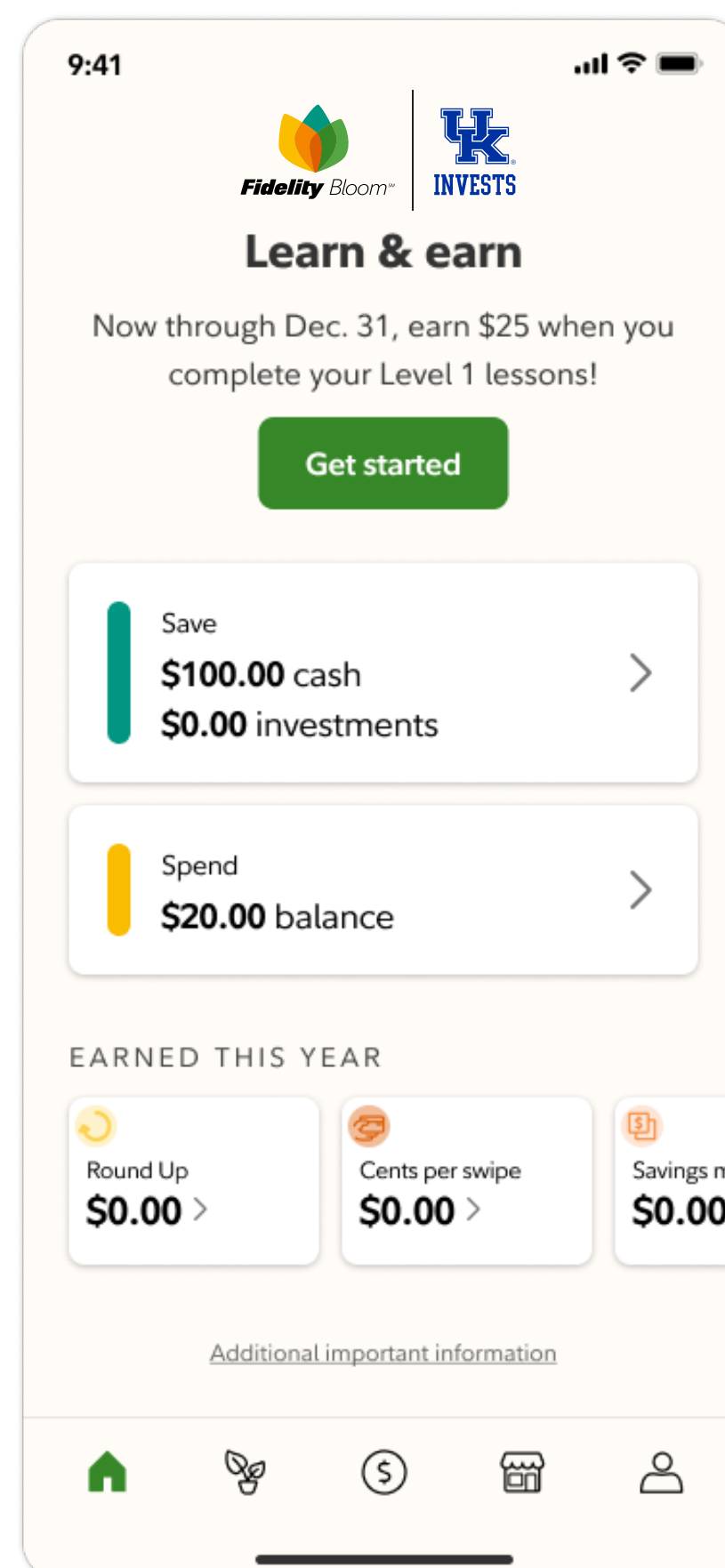
# HOW TO Select your first investment

1 Once you've added money to your Save account, tap the Save account tile on the Home tab.

2 Tap the Investments tile.

3 Browse mutual fund collections directly or learn more through lessons and tools.

*\*Fidelity Bloom® offers the investing capabilities of certain types of securities, such as mutual funds, exchange-traded funds, and stocks. To buy or sell additional securities, log into Fidelity.com or use the Fidelity Investments app.*





# HOW TO Make your first investment

1

Use the Browse tab to find investments, then tap the individual investment you want to make.

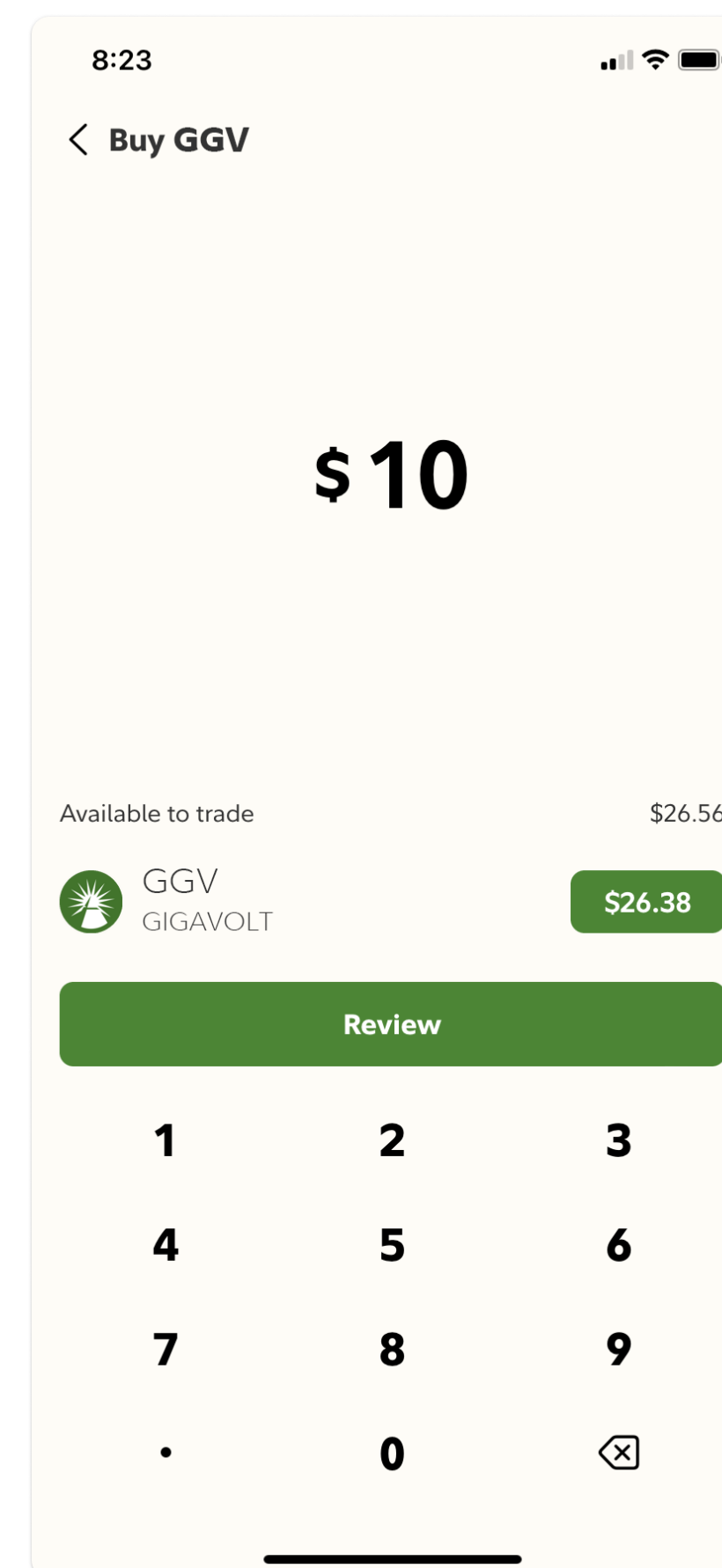
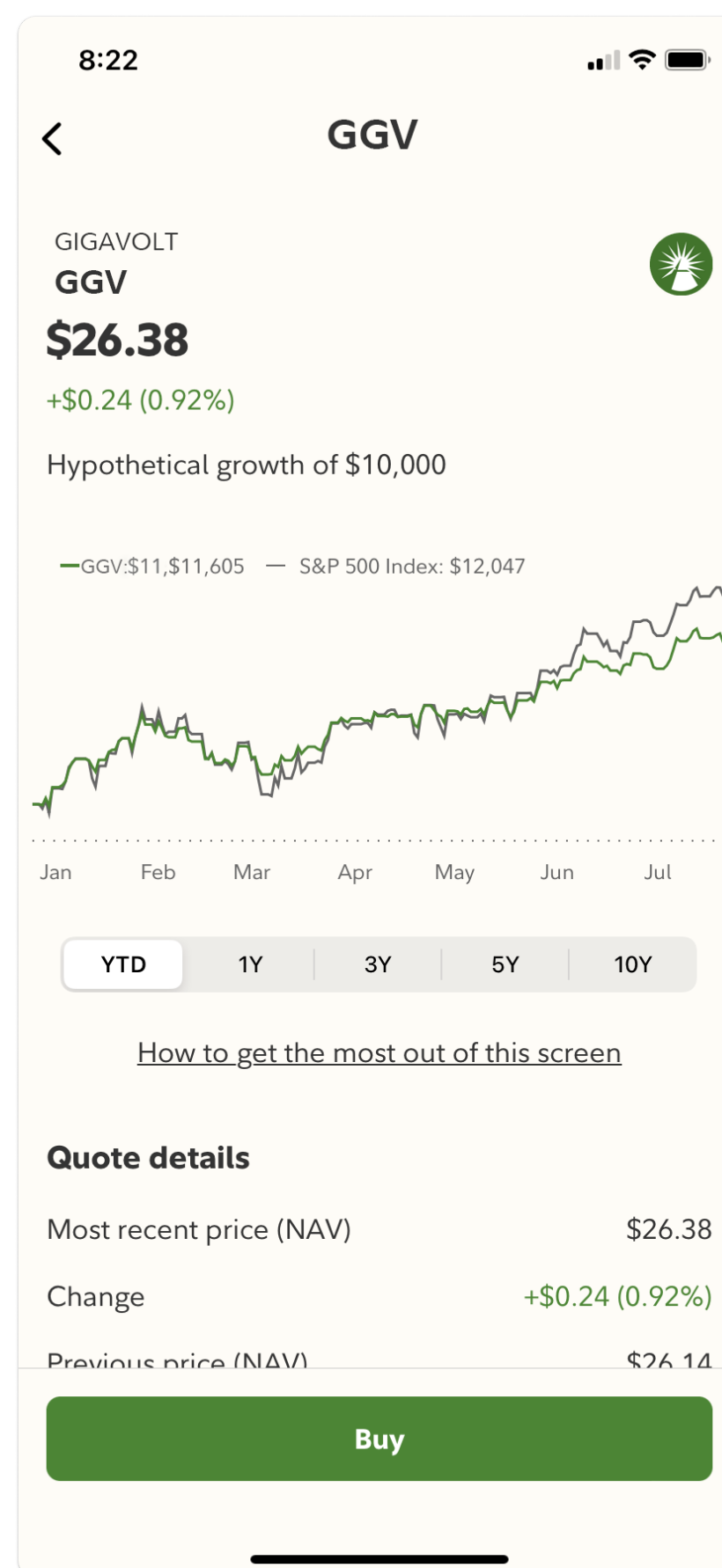
*\*The purchase or sale of an investment is often referred to as a "trade."*

2

Tap "Buy" and confirm the amount and price of your trade.

3

Tap "Buy" again to complete your trade. Congrats—you're now an investor!



*Investing involves risk, including risk of loss.*

Screenshots are for illustrative purposes only and are subject to change..

The Fidelity Bloom app is designed to help with your saving, spending, and investing behaviors through your Save and Spend accounts, which are brokerage accounts covered by SIPC. They are not bank accounts and are therefore not covered by FDIC insurance.

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