

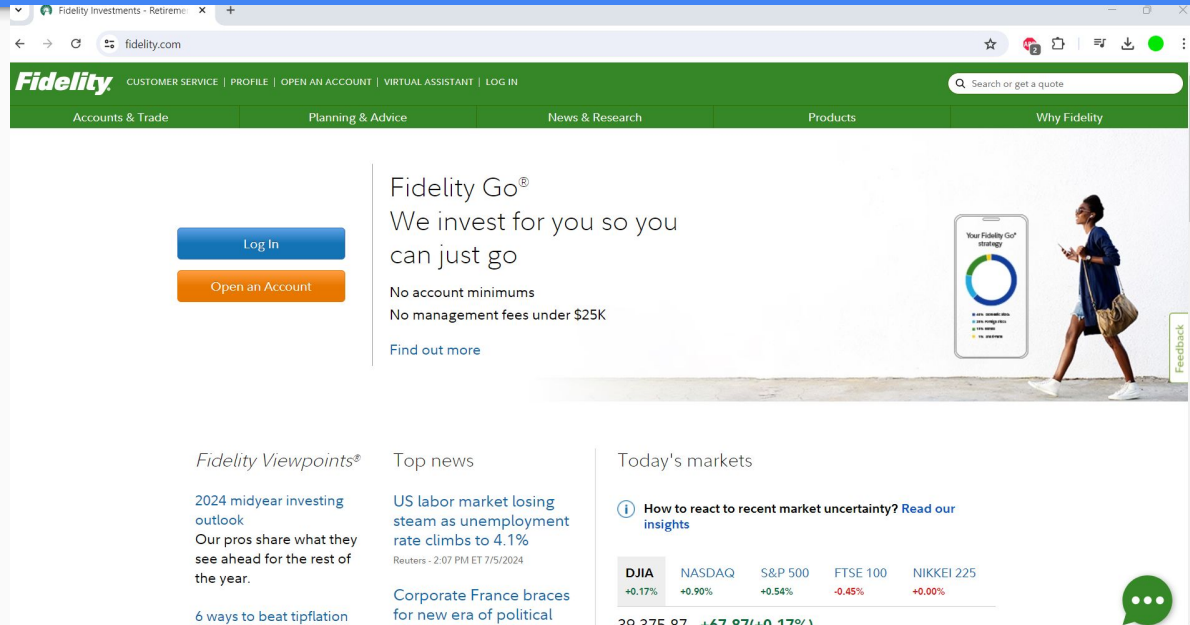
crazymiser.com

How to open a Fidelity account



Step 1: Go to Fidelity.com

1. Click **Open an Account**



The screenshot shows the Fidelity.com homepage. The navigation bar includes links for CUSTOMER SERVICE, PROFILE, OPEN AN ACCOUNT, VIRTUAL ASSISTANT, and LOG IN. The main content area features a large banner for Fidelity Go with a prominent orange 'Open an Account' button. Below the banner, there are sections for Fidelity Viewpoints, Top news, and Today's markets.

Fidelity CUSTOMER SERVICE | PROFILE | OPEN AN ACCOUNT | VIRTUAL ASSISTANT | LOG IN

Accounts & Trade | Planning & Advice | News & Research | Products | Why Fidelity

Search or get a quote

Fidelity Go®
We invest for you so you can just go

No account minimums
No management fees under \$25K

[Find out more](#)

Fidelity Viewpoints®

2024 midyear investing outlook
Our pros share what they see ahead for the rest of the year.

6 ways to beat tipflation

Top news

US labor market losing steam as unemployment rate climbs to 4.1%
Reuters - 2:07 PM ET 7/5/2024

Corporate France braces for new era of political

Today's markets

How to react to recent market uncertainty? [Read our insights](#)

| DJIA | NASDAQ | S&P 500 | FTSE 100 | NIKKEI 225 |
|--------|--------|---------|----------|------------|
| +0.17% | +0.90% | +0.54% | -0.45% | +0.00% |

30 275.87 ▲67.87/▲0.17%

Step 2: Select an account

Retirement IRAs

Rollover IRA

Open now

Roth IRA

Open now

Traditional IRA

Open now

Investing & Trading

Brokerage Account

Open now

Spending & Saving

Cash Management Account

Open now

[See all accounts](#)



Step 3: Enter your information

1. Select **No** (unless you have an account already)

Fidelity | Open an account

Let's open your brokerage account

Are you already a Fidelity customer?

Yes No

Select Yes if you have a brokerage, IRA, 401(k), or other Fidelity account.

Opening an account takes just a few minutes

- First, you'll need to confirm your identity and employment information.
- Once the account is open, you'll create a username and password.
- Finally, begin the process of transferring money into your account.

Exit

Feedback

Step 3: Continue to enter your information

1. Enter your personal information

Fidelity Open an account

Tell us about yourself

First, we'll need a few details

Full name

First name

Middle name

Last name

Social Security number

Date of birth

Month

Day

Year

Country of citizenship

Mobile number

Step 4: Create a login

1. Create a username and password

Set up your password

Before you can fund your account, create a username and password to securely access your account online. Have questions? Please visit our [customer service](#) section for additional support options.

All fields required unless otherwise noted.

Create a username and password

Be sure not to include any personal information such as your date of birth or Social Security number.

Username

Use 6-15 letters or numbers, with no symbols or punctuation.

Password

Please use 6 to 20 letters, numbers, and/or special characters. Letters are case sensitive. [Show More](#)

Password Strength: Weak

Re-type password

Step 5: Add your bank

1. Click **Accounts & Trade**
2. Click **Transfers**

The screenshot displays the Fidelity website interface. At the top, the Fidelity logo is followed by navigation links: CUSTOMER SERVICE, PROFILE, OPEN AN ACCOUNT, VIRTUAL ASSISTANT, and LOG OUT. A search bar on the right contains the text "Search or get a quote". Below the navigation bar, a horizontal menu features five main categories: Accounts & Trade, Planning & Advice, News & Research, Products, and Why Fidelity. The "Accounts & Trade" category is expanded, showing a vertical list of sub-options: Portfolio, Account Positions, Trade, Trading Dashboard, Active Trader Pro, Transfers (highlighted in green), Cash Management, Bill Pay, Full View®, and Security Settings. The main content area shows the "All accounts" page, with a sub-menu containing Summary, Positions, Balances, Activity & Orders, Documents, Planning, and More. The "Summary" tab is selected. A "Balance" section is visible, and a notification banner at the bottom right states: "We found at least one account without a beneficiary".

Step 6: Send money from bank

1. Click **Send money from my bank**



Transfers

Transfer to or from Fidelity

[Send money from my bank](#)

[Send money to my bank](#)

[Transfer between Fidelity accounts](#)

[Bank wire from Fidelity](#)

[Bank wire to Fidelity](#)

[Transfer to someone else's Fidelity account](#)

[Send money to a Venmo/PayPal account](#)

[Move an account to Fidelity](#)

Other transfer options

[Set up a recurring transfer](#)

[Calculate my RMD](#)

[Deposit a check](#)

[Set up a direct deposit](#)

[Make a qualified charitable distribution \(QCD\)](#)

Manage

[Link a bank](#)

[Manage linked accounts and banks](#)

[Manage recurring activity](#)

[View my transfers in Activity & Orders](#)

[Check status of an account transfer](#)

Step 7: Add a bank

1. Select **add a bank or recipient**

Let's transfer between Fidelity and your bank

Select the account to transfer from

From

 Next, you'll follow steps to add a new bank or recipient.

[Exit to portfolio summary](#)

[Continue](#)

Step 8: Select your transfer method

1. If you are transferring from a bank select these options:

EFT

Myself

Let's get started!

How do you want to transfer money? EFT

Send money between your linked bank accounts or to someone else's. Available in 1-3 days.

Bank wire

Send same day before 4pm. Possible bank fee.

Payment app

Send to a PayPal account. Available same day.

Fidelity account

Transfer to someone else's linked Fidelity account. Available same day.

Who do you want to send money to?

Myself

Someone else

Continue

Step 9: Adding bank information

1. Selection **Enter my bank information on my own**

How do you want to transfer money?

Electronic funds transfer (EFT)
Send money between your linked accounts. Available in 1-3 days

Bank wire
Send same day before 4pm. Possible bank fee.

Who owns this bank account?

Myself Someone else

Is this bank a business account?

Yes No

How do you want to add bank information?

Log into my bank account with Fidelity
Use Fidelity, a Mastercard company, to quickly and securely connect your bank to all eligible Fidelity accounts.
[Learn more about Fidelity](#)

Enter my bank information on my own
Enter your bank information and then choose which eligible Fidelity accounts you'd like to link.
Where do I find account and routing numbers?

Step 10: Select your account

1. Link the **Fidelity account** you just made
2. Link a new bank

What transfer type would you like to enable for this account?

- Transfer types**
- Electronic funds transfer (EFT)
Deposit and withdraw money from Fidelity. (Free)
 - Bank wire
Only withdraw money from Fidelity. (Bank fees may apply)

[+ Important details](#)

Which account would you like to link this bank to?

Certain types of Fidelity accounts are ineligible for EFT. [Learn more](#)

Fidelity account

Select the bank account you'd like to link

Linked bank accounts

- Link a new bank

[Why don't I see all my linked bank accounts?](#)

Step 11: Select the account type

1. Select the **account type** (ex. **Savings** or **checking**)
2. Enter your **Routing & Account number**

Who owns this bank account?

Bank account owner I am the owner Someone else

Account type Checking or brokerage
 Savings
 Business

What's your bank information?

[Help me find this information](#)

Routing number

Account number

Re-enter account number

Step 12: Agree to terms

1. Select **Agree & Continue**

By selecting **Agree & Continue** below, you are acknowledging that you have read and agree to the Terms & Conditions for adding the electronic funds transfer (EFT) feature to your account, and have also reviewed the [Electronic Funds Transfer Disclosures](#).

By selecting **Agree & Continue**, you are also representing to Fidelity that you are the owner of the bank account noted above, that you are authorized to deposit money in and withdraw money from the account, and that Fidelity is entitled to rely solely on your direction in connection with such deposits and withdrawals regardless of whether there are other owners of the account in addition to you.

[⊕ View Terms & Conditions](#)

Exit

Back

Agree & Continue