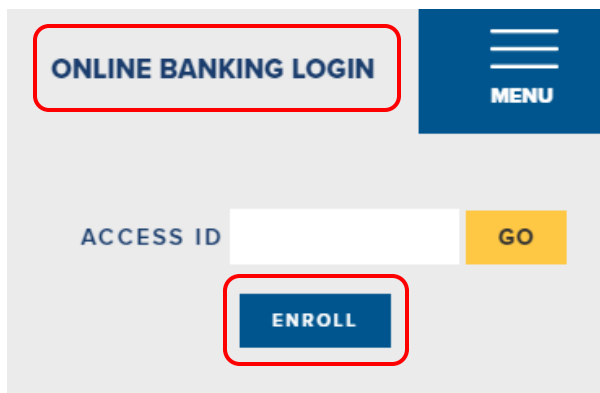


# Enrolling for e-Statements

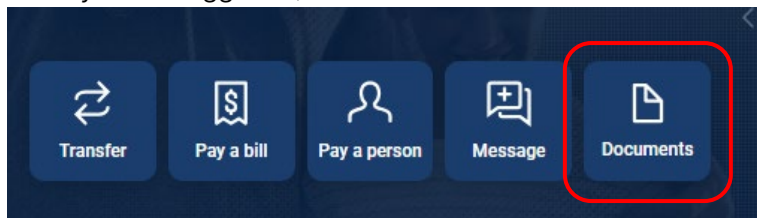
At Fidelity Bank & Trust, we are proud to offer e-Statements as a convenient option through Online or Mobile Banking. Follow the directions below to get started receiving your e-Statements today!

## HOW TO ENROLL FOR E-STATEMENTS

**Login to your Online/Mobile Banking account.** If you are not currently enrolled in our e-Banking platform, visit [www.bankfidelity.bank](http://www.bankfidelity.bank), and click on ENROLL by selecting ONLINE BANKING LOGIN next to the menu.



Once you are logged in, **click on the Documents icon** located in your dashboard.



**Click on Details** to see a list of accounts that can be enrolled for e-statements and **review your email address**.

You may choose to receive your statements for your account(s) delivered via email and made available online through this site. To enroll your account(s) please follow the steps outlined below:

1. Account(s) and Document Enrollment  
All available documents for all active accounts. [Details](#)
2. Please review the following email address. If not correct, please update it in the space shown.

**Select account(s)** you want to receive an e-statement for.

Tip: If you only want to enroll certain accounts, uncheck the top box “Enroll All Available Accounts and Document Types Shown.” You can then manually select the accounts you would like to receive e-statements for.

☒ Enroll All Available Accounts and Document Types Shown

Enroll Accounts

- > ☒ SNRCITZN 0004
- > ☒ 24 MONTH 0005
- > ☒ SAV 0001
- > ☒ 60 MONTH 0001

**Optional: Select document(s)** you want to receive an e-statement for on account(s) selected. If an account is selected (box is checked next to the account number), the account will be enrolled for all document types including e-statements, sweep transfer notices and tax documents (if applicable).

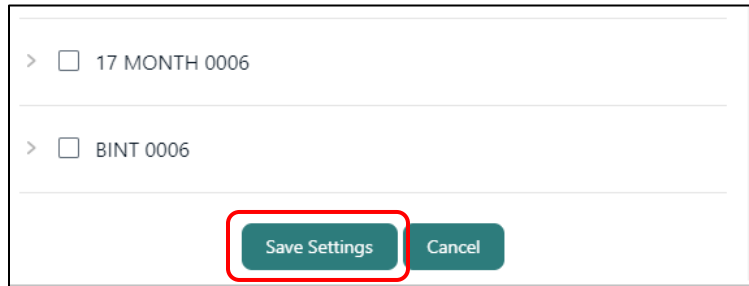
Tip: You can manually edit documents you wish to unenroll for e-statements by clicking the down arrow next to the account. Please note, you must have the Enhanced Statements box checked in order to be enrolled for e-statements.

▼ ☒ SNRCITZN 0004

Enroll Available Document Types

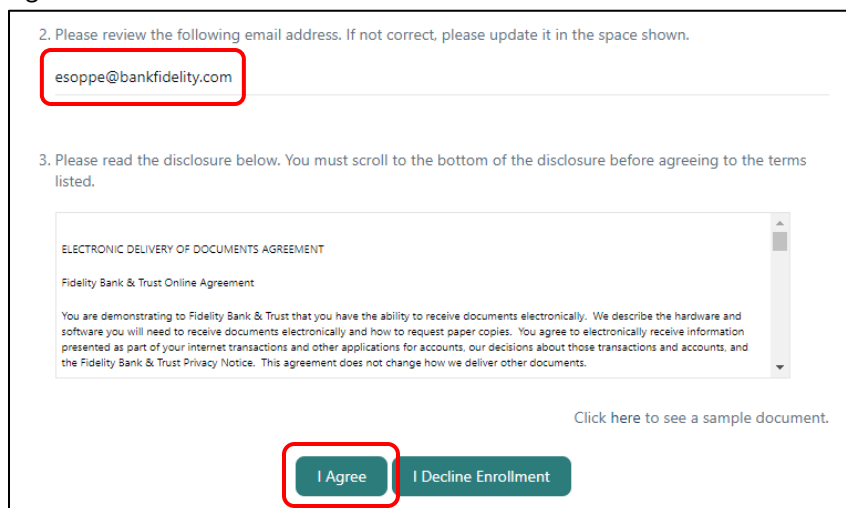
- ☒ Enhanced Statements
- ☒ TN7218P 1099-INT TaxMaster Reporting Form
- ☒ Sweep Transfer Notice
- ☒ 1099-MISC TaxMaster Reporting
- ☒ 1099-SA TaxMaster
- ☒ 5498-SA TaxMaster

Once you have completed your selection of accounts and documents to enroll for e-statements, **select Save Settings** by scrolling to the bottom of the screen.



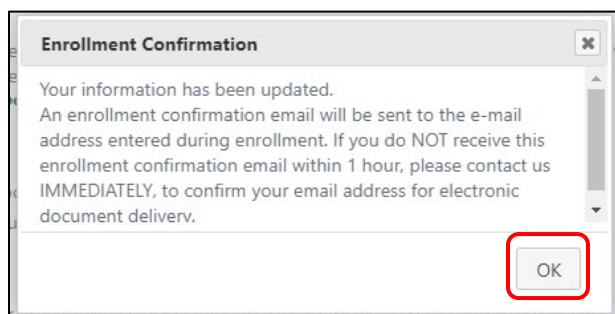
The screenshot shows a list of accounts with checkboxes: "> ☐ 17 MONTH 0006" and "> ☐ BINT 0006". At the bottom, there are two buttons: "Save Settings" (highlighted with a red box) and "Cancel".

**Verify your email address** is correct, and **click I agree** to the Electronic Delivery of Document Agreement.



The screenshot shows a form with two sections. The first section, labeled "2. Please review the following email address. If not correct, please update it in the space shown.", contains the email address "esoppe@bankfidelity.com" (highlighted with a red box). The second section, labeled "3. Please read the disclosure below. You must scroll to the bottom of the disclosure before agreeing to the terms listed.", contains a scrollable area titled "ELECTRONIC DELIVERY OF DOCUMENTS AGREEMENT" with the text: "Fidelity Bank & Trust Online Agreement. You are demonstrating to Fidelity Bank & Trust that you have the ability to receive documents electronically. We describe the hardware and software you will need to receive documents electronically and how to request paper copies. You agree to electronically receive information presented as part of your internet transactions and other applications for accounts, our decisions about those transactions and accounts, and the Fidelity Bank & Trust Privacy Notice. This agreement does not change how we deliver other documents." Below the scrollable area is a link "Click here to see a sample document." At the bottom, there are two buttons: "I Agree" (highlighted with a red box) and "I Decline Enrollment".

**Click OK** on the Enrollment Confirmation screen.

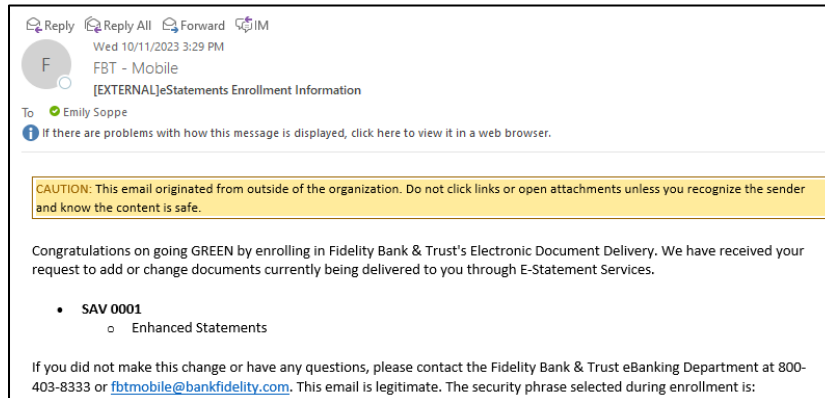


The screenshot shows a dialog box titled "Enrollment Confirmation". The text inside reads: "Your information has been updated. An enrollment confirmation email will be sent to the e-mail address entered during enrollment. If you do NOT receive this enrollment confirmation email within 1 hour, please contact us IMMEDIATELY, to confirm your email address for electronic document delivery." At the bottom right, there is an "OK" button (highlighted with a red box).

Once you confirm, you will be directed to the documents screen.

Tip: The next time your statement is cycled, you will be able to retrieve it from this page.

An **email will be sent from [fbtmobile@bankfidelity.com](mailto:fbtmobile@bankfidelity.com)** confirming you have enrolled for e-statements listing the account(s) and document(s) enrolled.



**You are now enrolled for e-Statements!** e-Statements will be generated for the account(s) selected going forward (not available for past statements). A paper statement will no longer be mailed. Please contact 800.403.8333 for further assistance or questions.

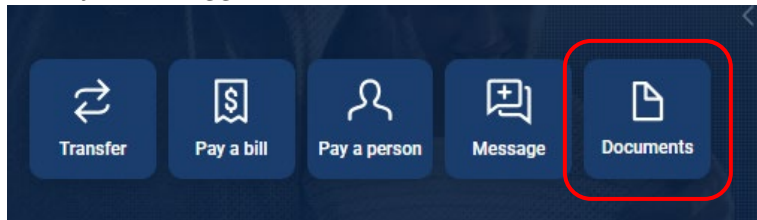
## Enrolling additional account(s) for e-Statements

At Fidelity Bank & Trust, we are proud to offer e-Statements as a convenient option through Online or Mobile Banking. Follow the directions below if you currently have an account enrolled for e-Statements and would like to enroll additional account(s) and/or documents.

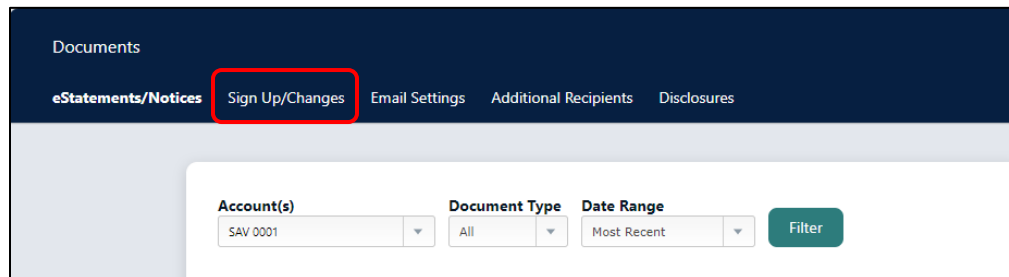
### HOW TO ENROLL ADDITIONAL ACCOUNT(S) FOR E-STATEMENTS

**Login to your Online/Mobile Banking account.**

Once you are logged in, **click on the Documents icon** located in your dashboard.



**Click on Sign Up/Changes.**



**Select account(s)** you want to receive an e-statement for. Please note, a checkmark next to the account indicates enrollment of e-statements for all available document types.

Tip: If you only want to enroll certain accounts, uncheck the top box “Enroll All Available Accounts and Document Types Shown.” You can then manually select the accounts you would like to receive e-statements for.

**Instructions:** Below is a list of accounts and document types that are available for enrollment in electronic delivery. You may place a check next to any document you wish to enroll or place a check next to any account(s) in which you wish to enroll all documents. If you uncheck any document or account, you will be unenrolled in electronic delivery for those applicable documents and/or accounts. No selections will be saved until you select the “Save Settings” button.

☒ Enroll All Available Accounts and Document Types Shown

Enroll Accounts

> ☐ SNRCITZN 0004

> ☐ 24 MONTH 0005

> ☒ SAV 0001

> ☐ 60 MONTH 0001

**Optional: Select document(s)** you want to receive an e-statement for on account(s) selected. If an account is selected (box is checked next to the account number), the account will be enrolled for all document types including e-statements, sweep transfer notices and tax documents (if applicable).

Tip: You can manually edit documents you wish to unenroll for e-statements by clicking the down arrow next to the account. Please note, you must have the Enhanced Statements box checked in order to be enrolled for e-statements.

▼ ☒ SNRCITZN 0004

Enroll Available Document Types

☒ Enhanced Statements

☒ TN7218P 1099-INT TaxMaster Reporting Form

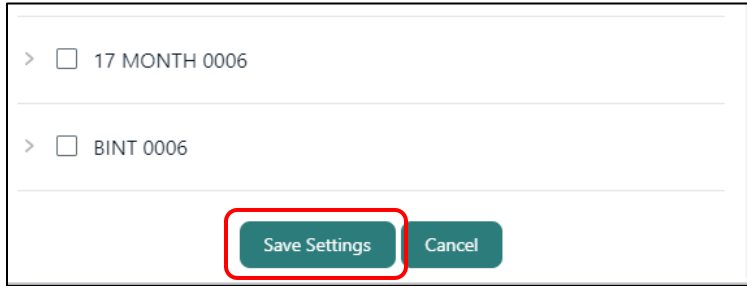
☒ Sweep Transfer Notice

☒ 1099-MISC TaxMaster Reporting

☒ 1099-SA TaxMaster

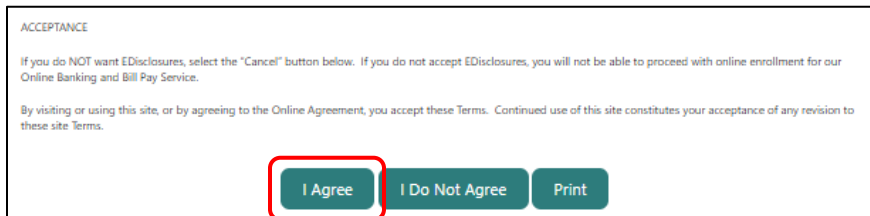
☒ 5498-SA TaxMaster

Once you have completed your selection of accounts and documents to enroll for e-statements, **select Save Settings** by scrolling to the bottom of the screen.



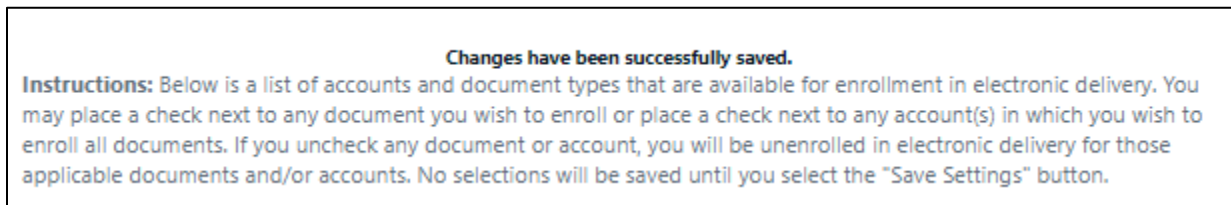
A screenshot of a web interface showing two unchecked checkboxes: "> ☐ 17 MONTH 0006" and "> ☐ BINT 0006". At the bottom, there are two buttons: "Save Settings" and "Cancel". The "Save Settings" button is highlighted with a red rectangular box.

The Electronic Delivery of Document Agreement will appear after you Save Settings. Review the agreement and **click I agree** to accept the terms.



A screenshot of an "ACCEPTANCE" section. It contains two paragraphs of text. The first paragraph states: "If you do NOT want EDisclosures, select the 'Cancel' button below. If you do not accept EDisclosures, you will not be able to proceed with online enrollment for our Online Banking and Bill Pay Service." The second paragraph states: "By visiting or using this site, or by agreeing to the Online Agreement, you accept these Terms. Continued use of this site constitutes your acceptance of any revision to these site Terms." At the bottom, there are three buttons: "I Agree", "I Do Not Agree", and "Print". The "I Agree" button is highlighted with a red rectangular box.

**Your changes in e-Statement enrollment have been saved!** e-Statements will be generated for the account(s) selected going forward (not available for past statements unless the account was previously enrolled). A paper statement will no longer be mailed. Please contact 800.403.8333 for further assistance or questions.



A screenshot of a confirmation message. It says "Changes have been successfully saved." in bold. Below it, in a smaller font, is the text: "Instructions: Below is a list of accounts and document types that are available for enrollment in electronic delivery. You may place a check next to any document you wish to enroll or place a check next to any account(s) in which you wish to enroll all documents. If you uncheck any document or account, you will be unenrolled in electronic delivery for those applicable documents and/or accounts. No selections will be saved until you select the 'Save Settings' button."

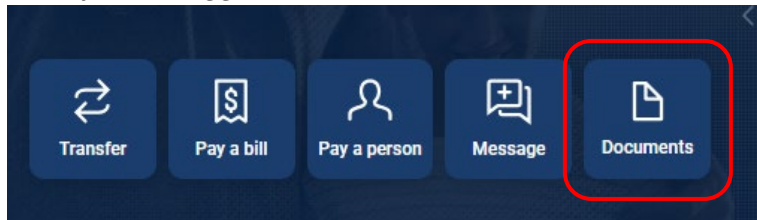
# Viewing e-Statements

At Fidelity Bank & Trust, we are proud to offer e-Statements as a convenient option through Online or Mobile Banking. Once enrolled for e-Statements, you will receive an email (to the email address on file) when your statement is generated. Follow the directions below to view.

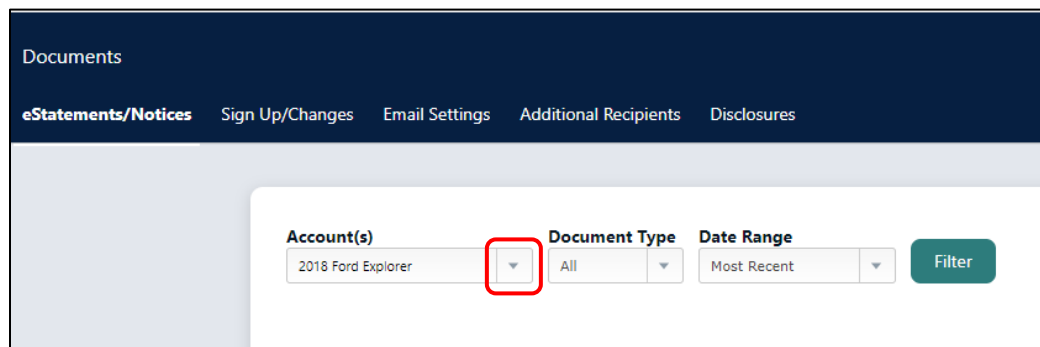
## HOW TO VIEW YOUR E-STATEMENTS

**Login to your Online/Mobile Banking account.**

Once you are logged in, **click on the Documents icon** located in your dashboard.



Your default account will show in the **Account(s)** dropdown. **Click the dropdown** (down triangle) to select another account, or to select multiple accounts. Please note, we are unable to select which account is the default.





**Select the account(s)** you would like to view an e-Statement for by using the **Account(s)** dropdown. Please note, a checkmark next to the account indicates your selection.

Tip: Select the **Date Range** dropdown to view an e-Statement prior to the current statement.

e-Statements are stored for 18 months. If your account has not been enrolled for 18 months, you can view e-Statements beginning the first month after enrollment.

Once selections are made, **click Filter**.

**Click on the Download icon** to view your e-Statement. Please note, you must be able to view PDFs on your device to view your e-Statement.

Account	Date	Type	Description	Download
Emily's Checking	09/29/2023	Statement	Enhanced Statements September 2023	

**You can now view your e-Statements!** e-Statements can be printed or saved to your device accordingly. Please contact 800.403.8333 for further assistance or questions.