

Fidelity Advisor Plan Sponsor Access and Contribution Submissions

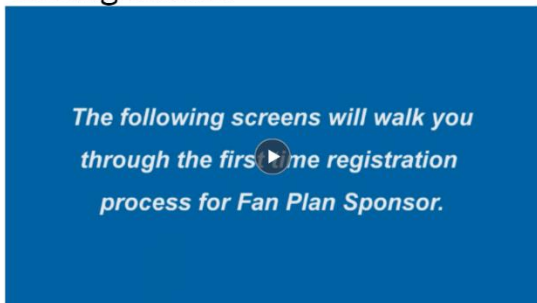
Table of Contents | plansponsor.fidelity.com

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Need Help? Check out these step-by-step videos on the home page!
For more information, visit the Help section in the top-right corner of the screen.

Getting Started



The following screens will walk you through the first-time registration process for Fan Plan Sponsor.


DST Fan Plan Sponsor site Log in Process
1:37



Congratulations on completing your registration for Fan Plan Sponsor!

NOTE: Remember you will continue to log in at FA Simple.com and will be automatically rerouted to Fan Plan Sponsor.

DST Fan Plan Sponsor site Contributions
1:46

 [Print](#) | [Help](#) | [Log Off](#)
[Profile](#) | [Plan Selection](#)

Contact Us

If you have questions during the process, please call a Fidelity representative at **877-208-0098**, Monday through Friday, between 8:30 a.m. and 7:00 p.m. Eastern time.



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Accessing Your Plan Sponsor Web Portal

plansponsor.fidelity.com | Overview

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Plan sponsors can manage contributions to their plan via Fan Plan Sponsor, which is a product of DST Vision

FIRST TIME LOGIN

Please note that all information required for the registration process will be provided by Fidelity

1 Go to plansponsor.fidelity.com

2 Click **Access your Account**

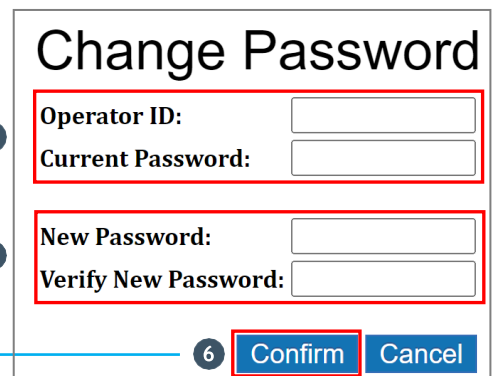
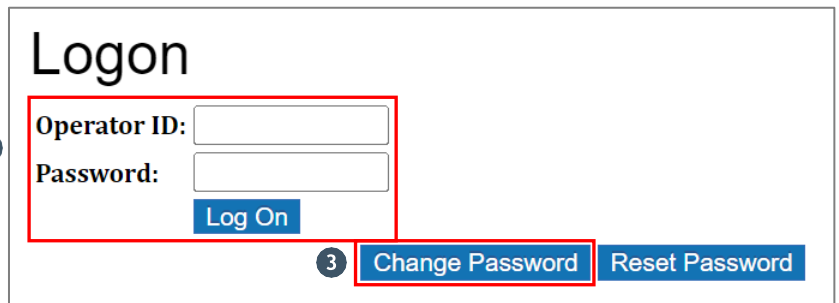
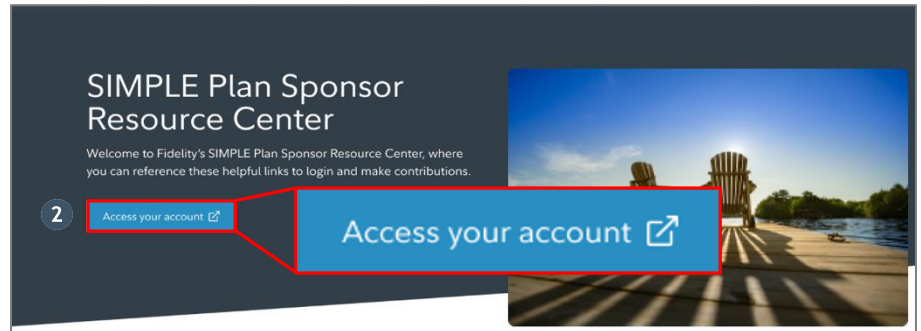
3 Click **Change Password**

4 Enter your Operator ID and your current password

5 Enter your new password in both the New and Verify Password fields
See below for criteria

6 Click **Confirm**

7 You will be returned to the Logon screen. Enter your Operator ID and New Password, then click **Log On**



NEW PASSWORD CRITERIA

- Must be exacty 8 characters in length
- Password must contain 1 alpha character, 1 numeric character, and 1 special character
- Special characters that can be used include: " & @ : \$ + % # ?
(**Note:** special character should not be used as the first character of the password)
- Cannot have repeating characters (e.g., 44, aaa, etc.)
- Cannot have spaces
- Cannot be the same as the last 6 passwords used
- **Must be changed every 30 days**

- 8 You will be asked to establish security questions and add your email address. Once you have entered this info, click **Next**

Note: These credentials will be used should you need to reset your password in the future

- 9 Verify the information is correct, then click **Next** to proceed, or **Back** to make changes

- 10 You will receive confirmation of your selection. Click **Continue** to proceed to the Plan Details Screen

8 **Operator Profile**

Reset password question:

Reset password answer:

Reset password question:

Reset password answer:

Reset password question:

Reset password answer:

Email address:

Next **Cancel**

9 **Operator Profile Verification**

Please verify the following security information:

Reset password question: Who is your favorite cousin?
Reset password answer: *****

Reset password question: What is the first name of your niece?
Reset password answer: *****

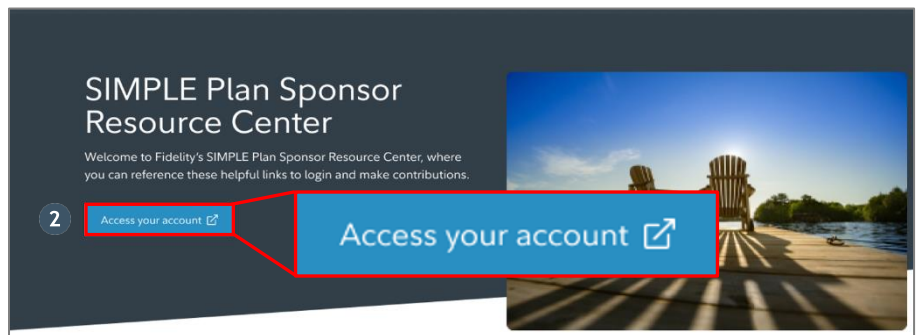
Reset password question: What is your maternal grandma's first name?
Reset password answer: *****

Email address:

Next **Back** **Cancel**

RETURNING USER LOGIN

- 1 Go to plansponsor.fidelity.com
- 2 Click **Access your Account**
- 3 Enter your Operator ID and your current password, then click **Log On**
- 4 If you've forgotten your password, select **Reset Password** and follow the steps on page 4



3 **Logon**

Operator ID:

Password:

Log On

Change Password **Reset Password** 4

If you forget your password, or your password becomes disabled, you will need to use the **Reset Password** functionality to get back into the site

1 Go to plansponsor.fidelity.com

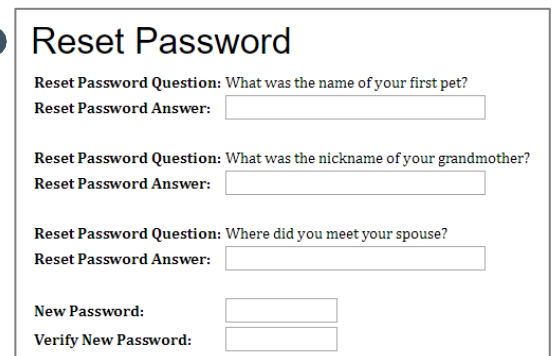
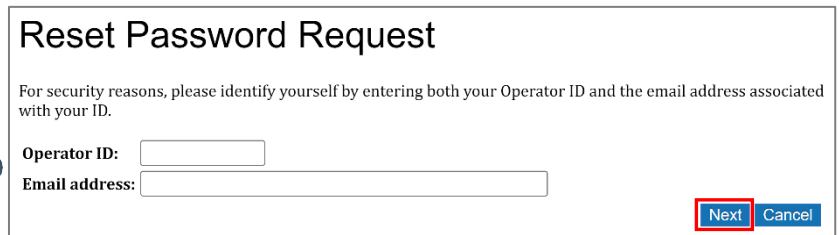
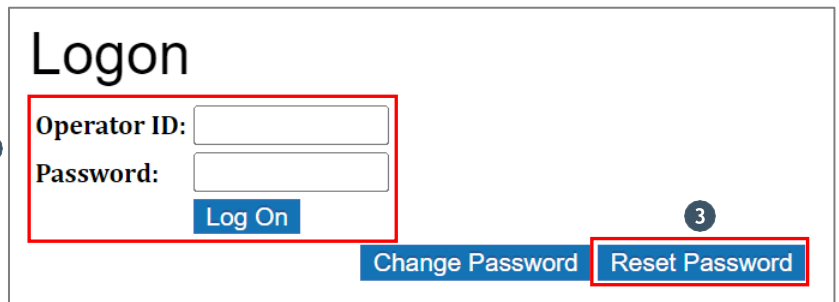
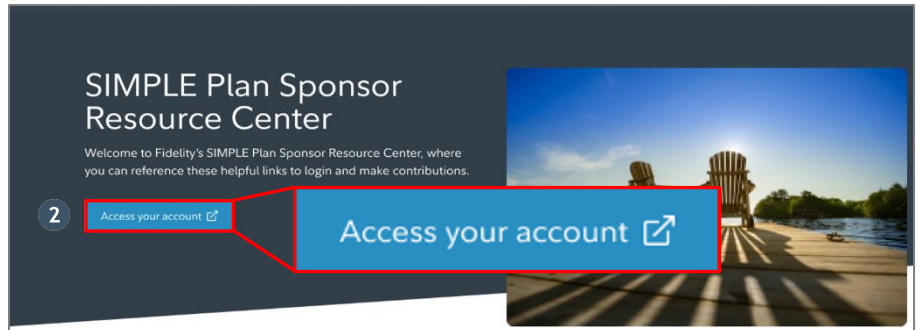
2 Click **Access your Account**

3 Click on **Reset Password**

4 Enter your Operator ID and Email, then click **Next**

5 Answer your security questions, and enter your new password in both the New and Verify Password fields, then click **Continue**

6 You will be returned to the Logon screen. Enter your Operator ID and New Password, then click **Log On**



The **Plan Details** page allows you to view and update details related to the plan by expanding each category. Simply click the **+** next to the category you wish to view to expand it, or click **Expand All** to expand all of the categories

Plan Details

[Expand All](#) [Collapse All](#)

- [+ Plan Information](#)
- [+ Company Information](#)
- [+ Bank Information](#)
- [+ Shareholders](#)

[Access Rosters](#) [Back](#)

Submitting Contributions

Fan Plan Sponsor allows you to make and track your employee contributions

*Each submission is entered and kept on file as a **Roster***

One Submission = One Roster

- 1 From the Plan Details screen, click **Access Rosters**
- 2 To make contributions, click **New Roster**

Note: Each time you create a New Roster, it will be saved in a Not Submitted status

1

Access Rosters

2

New Roster

Roster Selection

Plan Name: FIDELITY INVESTMENTS

Plan ID: 123456789

Contribution Type: ACH

To establish a new roster containing all shareholders within the plan, click **New Roster**.

Roster Search

To locate a specific rosters, you may search by roster status and the roster status date, or a specific period of time.

By Status: All Expired Held Processed Rejected Released Not Submitted

Plan ID: 123456789

Operator ID:

Confirm Number:

Payment Amount:

By Status Date: to

or

[Search](#)

186 results found...

Default Roster	Status ▲	Roster Name	Confirm Number	Trade Date	Total Amount	SSN Count	Payment Type	Operator ID	Last Operator ID	Release Operator ID	
<input type="radio"/>	Not Submitted		1234-5678-90123	N/A	\$0.00	5	ACH	F1456789	F1456789	N/A	Access Roster...

New Roster Wizard

1 Step 1: Roster Name

Enter a name for your Roster (optional), then click **Next**

2 Step 2: Employees

Select the employees you wish to make a contribution for or check the **Select All** box to add all employees to the Roster. Once you have made your selection, click **Next**

3 Step 3: Contribution Amount

Enter all ER and SR contributions, then click **Next**. You will be able to review the information prior to submission

ER = Employer Reduction (Employer Contribution)

SR = Salary Reduction (Employee Contribution)

4 Step 4: Verify Roster

Verify that the information entered is correct. Click **Submit** to release the Roster, or click **Back** to make changes

1 New Roster Wizard

Plan Name: FIDELITY INVESTMENTS
 Plan ID: 123456789
 Contribution Type: ACH
 Status: Not Submitted
 Established Date: 05/09/2023 09:44:43 AM

Step 1: Roster Name
 Step 2: Employees
 Step 3: Contribution Amount
 Step 4: Verify Roster

What would you like to call this Roster?

Click Next to accept the default roster name. Otherwise, please enter the roster name.

NEW ROSTER NAME

Cancel Next

2 New Roster Wizard

Plan Name: FIDELITY INVESTMENTS
 Plan ID: 123456789
 Contribution Type: ACH
 Status: Not Submitted
 Established Date: 05/09/2023 09:44:43 AM

Step 1: Roster Name
 Step 2: Employees
 Step 3: Contribution Amount
 Step 4: Verify Roster

Select employees to include on the Roster

Select All Employees

Employee Name	SSN
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Back Cancel Next

3 New Roster Wizard

Plan Name: FIDELITY INVESTMENTS
 Plan ID: 123456789
 Contribution Type: ACH
 Status: Not Submitted
 Established Date: 05/09/2023 09:53:00 AM

Step 1: Roster Name
 Step 2: Employees
 Step 3: Contribution Amount
 Step 4: Verify Roster

Please verify or edit the employee contribution amounts

Choose option below to update ALL contribution amounts or review them individually in the list below

Clear all contribution amounts. I'll enter them myself.
 Update all contribution amounts to: \$ 0.00

Contribution Year: Current
 Payment Type: ACH Check

Employee Name	SSN	Contribution Year	Employer Reduction	Salary Reduction
		2023	\$ 0.00	\$ 0.00
		2023	\$ 0.00	\$ 0.00
		2023	\$ 0.00	\$ 0.00
TOTAL:			\$ 0.00	\$ 0.00

Back Cancel Next

4 New Roster Wizard

Plan Name: FIDELITY INVESTMENTS
 Plan ID: 123456789
 Contribution Type: ACH
 Status: Not Submitted
 Established Date: 05/09/2023 09:53:00 AM

Step 1: Roster Name
 Step 2: Employees
 Step 3: Contribution Amount
 Step 4: Verify Roster


Please verify the following information


Roster Name:
 Status: New
 Status Date: 05/08/2023
 Release Date: 05/09/2023
 Contribution Year: Current
 Payment Type: ACH
 Total Amount: \$300.00
 Participating Employees: 3
 Operator: FI456789

Employee Name	SSN	Contribution Year	Employer Reduction	Salary Reduction
		2023	\$50.00	\$50.00
		2023	\$50.00	\$50.00
		2023	\$50.00	\$50.00
TOTAL:			\$ 150.00	\$ 150.00

Back Cancel Save for Later Submit

The **Confirmation** page shows the roster is in a Released status, which means it has been sent to Fidelity for processing





Submit Roster Confirmation

Plan Name: FIDELITY INVESTMENTS
Plan ID: 123456789
Confirmation Number: 1234-5678-90123

The following roster was submitted successfully.

Status	Status Date	Trade Date	Contribution Year	Total Amount	SSN Count	Payment Type	Operator ID	Last Operator ID
Released	05/09/2023	05/09/2023	Current	\$300.00	3	ACH	FI456789	FI456789

[Return to Roster Selection](#)

ROSTER STATUSES

Not Submitted: The Roster has been created but not yet submitted*

Released: The Roster has been released, but not yet processed**

Processed: The Roster has been processed successfully

*Max of 9 Rosters in "Not Submitted" status. New rosters cannot be created until previous rosters are submitted or deleted

**If you need to cancel a Roster submission, please call a Fidelity representative at 877-208-0098 for assistance Monday-Friday 8:30am-7:00pm Eastern Time

Viewing Contribution Totals

[Back to Home](#)

Users may view the total Prior and Current year contributions for each employee within the plan

Note: All contributions are coded for the year in which they are received. Should you need to claim a contribution as prior year, please consult with a tax professional

- 1 Expand the **Shareholders** section by clicking on the **+**

The screenshot shows the 'Plan Details' page. At the top right, there are links for 'Print | Help | Log Off Profile | Roster Selection'. Below the title, there are 'Expand All' and 'Collapse All' buttons. The page is divided into sections: 'Plan Information', 'Company Information', 'Bank Information', and 'Shareholders'. The 'Shareholders' section is expanded and highlighted with a red box and a circled '1'.

- 2 Click **Contributions** next to the employee you wish to view

The screenshot shows a list of shareholders with columns for 'Name' and 'SSN'. Next to each row is a blue link labeled 'Contributions'. A circled '2' points to one of these links.

- 3 The Shareholder Contributions screen will display both the **Prior** and **Current** Year-to-Date (YTD) contributions

The screenshot shows the 'Shareholder Contributions' summary page. It includes the following information:

- Plan Name: FIDELITY INVESTMENTS
- Plan ID: 123456789
- SSN: 987654321
- Shareholder: SMITH, JOHN
- Total Prior YTD 2022: \$2,836.64
- Total Current YTD 2023: \$939.02

Fund / Account Number	Prior YTD	Current YTD 2023
0000177/00000000000	\$1418.44	\$469.56
Employee	\$1091.07	\$361.19
Employer	\$327.37	\$108.37
0006355/00000000000	\$1418.20	\$469.46
Employee	\$1090.94	\$361.13
Employer	\$327.26	\$108.33
Total:	\$2,836.64	\$939.02

A 'Back' button is located at the bottom right of the page.

Helpful Tip

For seamless navigation of the site, use the built-in back buttons and links on each page. Use of your browser's navigation buttons may result in a Confirm Form Resubmission page. Should this happen, you can simply refresh the page using your browser refresh button or F5 on your keyboard, then select Continue from the resulting Confirm Form Resubmission pop-up box.