



FREQUENTLY ASKED QUESTIONS (FAQs)

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JOINING THE FIDELITY GREENLINE FORUM (GLF)

What is the Fidelity Greenline Forum (GLF)?

The Fidelity Greenline Forum is an online market research community panel. It provides a place for the members to voice their opinions and contribute to the products and services that Fidelity offers its customers. Through participation in the surveys and other activities, members gain valuable insights and help shape the future of Fidelity's offerings. Membership in the GLF is special and completely voluntary.

Why join the GLF?

The Fidelity Greenline Forum is a unique way to voice your opinion on Fidelity and share thoughts on your investment experience. Most importantly, GLF members' input helps us continuously improve our products and services. As a member, you will have the unique opportunity to share your thoughts and views on a variety of investment-related topics. Feedback from GLF activities goes to the highest levels of the Fidelity organization and impacts strategic decision making. Aggregated findings and learnings from the previous months' surveys are then shared with members through a bimonthly newsletter.

Can my friend / spouse be a member of the GLF?

Currently, we are only accepting participation from Fidelity customers who are selected *through invitation only*. If both, you and your spouse / partner received invitations, we encourage you both to join.

Is there a fee or cost associated with the GLF membership?

No, membership to the GLF is completely free of cost. Being a member of the forum and participation in surveys and activities is voluntary. We hope you will find this engagement experience an enjoyable and rewarding one!





LOGIN AND ACCOUNT

How can I reset my password?

Go to your login page and click 'Forgot your password?'. Enter your registered email address and click 'Send'. You will receive an email, titled 'The Fidelity Greenline Forum - Password change demand', from support@fidelitygreenlineforum.com, with a link to reset your password.

Note: If you do not receive an email in your inbox, please check your spam / junk folder(s). In case the reset password link is not clickable, please move the email to primary Inbox and then access the link.

How can I change or set a profile picture / avatar for my account?

Click on  at top right corner of the GLF homepage. Now, click on 'MY INFORMATION' and you will be redirected to your profile page. Here, click on  under 'AVATAR', browse and select an image (up to 20 MB in size) of your choice and set as your profile picture / avatar.

How can I unsubscribe from the community?

The GLF membership is voluntary and is aimed to equip the members to share their thoughts. However, if you think the surveys or activities are of no interest to you or you do not have the time to participate, feel free to skip that particular survey. Also, in case you would still like to unsubscribe from the forum please write to us at: support@fidelitygreenlineforum.com, and we will ensure you don't receive further communication from our end.

COMMUNITY AND SURVEY PARTICIPATION

When will I receive my first invitation to participate, after signing up?

You should receive your first invitation within a few weeks of signing up, which will be sent to the email address you registered with.

How frequently will I be invited to share my opinion?

You should expect to receive between 1-2 invitations per month to participate in surveys or other activities. The GLF team issues many surveys each month, but every member will NOT be invited to participate in each survey. We want to make sure we only invite you to participate in activities that seem most relevant to you and your investment style.

How do I know if a survey or activity is open for participation?

We will send you an email notifying you when a new survey or activity is open. The email will include a short description of the survey objective and link to the survey or activity. The activities will show on your GLF homepage for participation, where all the open activities will have an 'Enter' status and the completed ones will be 'Closed'. All surveys and activities are voluntary.

What will be the typical duration of each survey or an activity?



We know that your time is valuable, so we ensure that our activities are as short as possible. On an average, the duration of each survey would be less than 10 minutes to complete. You can take as much time you need to complete an activity, the amount of time you spend is up to you.

Will I be able to complete a partially filled survey or an activity at a later time?

Yes, it is not necessary to take the entire survey or complete an activity in one go. If you leave a particular survey partially filled, please feel free to click on the link shared in the survey invite email again and complete the rest of the survey. Alternatively, you can also login to your GLF homepage, identify the particular survey under 'My activities' and click 'Enter' to complete the survey. The survey will resume from the very same question where you had left.

Is there an incentive or reward for my participation?

Many customers find that they enjoy being able to provide feedback and help Fidelity understand how they feel. Our customers will be able to provide feedback on new ideas for future products or services, and potentially test a beta version of a Fidelity platform or service. In addition, there would be regular feedback programs through engaging activities on the forum. Occasionally, there will be activities that do offer a monetary incentive, which will be mentioned within the invitation for that activity.

What will happen if I do not want to or do not have time to participate in a particular survey or activity?

Your participation is always voluntary. If you do not feel the activity fits your profile or will take too much time, you can choose not to participate in a particular survey or activity. We will continue to invite you to future activities. However, if after six months you do not participate in any activity, we may consider you an inactive member. Inactive members may not be given priority for future activities on the forum.

What happens to the responses I give in a GLF activity or survey?

When you register as a member and complete an activity, your information, as well as that of other community members is collected and shared with Fidelity. Your email address, name, and any other personally identifiable information will NOT be shared with other GLF members.

For more information, please see our privacy statement located in the Terms of Agreement (T&C) at the bottom of the GLF homepage. You can also access our privacy policy at: [Privacy Policy](#).

Can I take a survey on my mobile device?

At this time, you can participate in most of our surveys using a mobile device. We are continuously working to broaden our survey compatibility across all web-enabled devices.



GENERAL

What should I do if I am not receiving email notifications?

There is a chance that emails are landing in the spam / junk folder(s) of your mailbox. If you are able to locate the older emails, please mark the sender as a trusted source so that you receive emails in your primary Inbox in the future. However, if this does not help, please write to us at:

support@fidelitygreenlineforum.com.

Do I need special hardware or software?

There are not any specific hardware or software requirements, for a member to access the Fidelity Greenline Forum, though there can be certain surveys or activities that are more compatible with recommended browsers, that are, Google Chrome, Firefox, and Opera. However, if you face any difficulty in participating in a survey or an activity, please reach out to us at:


support@fidelitygreenlineforum.com.

What do you do with the personal information I provide?

Fidelity considers protection of personal information the foundation of customer trust and a sound business practice. We employ physical, electronic and procedural controls, and we regularly adapt these controls to respond to changing requirements and advances in technology. Fidelity does not share personal information about our customers with unaffiliated third-parties for use in marketing their products and services.

For more information, please see our privacy statement located in the Terms of Agreement (T&C) at the bottom of the GLF homepage. You can also access our privacy policy at: [Privacy Policy](#).

Help

If you experience any technical problem, please visit the member login page and click on 'Technical support' located at the footer of the page or click on  icon at the top right of the GLF homepage, to send us an email regarding a new or a follow-up query.

Alternatively, send an email at: support@fidelitygreenlineforum.com, and we will take care of the rest.

Fidelity Brokerage Services LLC

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