

GET CLEARED ✓

Welcome to your pre-boarding journey! Below are the steps that you will need to take over the next few weeks. Your offer is contingent on successfully clearing the background investigation. We appreciate your full participation and cooperation to complete this step accurately and efficiently.

Have further questions? Contact your Talent Acquisition Operations Associate.

PRE-BOARDING JOURNEY GUIDE

1 Sign your Offer

- **Congratulations!** You have signed your offer! Save a copy of your offer letter after signature

2 Provide your background Information

- Fill out all sections of your background form as soon as possible including education, criminal and employment history
- Answer questions and provide additional documentation, if needed.

3 Schedule your appointments

- Schedule your drug test appointment
- Schedule your fingerprinting appointment

4 Verify your employment eligibility

- Complete section 1 of your I-9 form
- Complete section 2 of your I-9 onsite at a regional office or virtually using our Authorized Representative process

5 Get cleared to start

- Receive an email with the outcome of your background investigation.

6 Prepare for your first day

- Submit direct deposit details and tax elections in [Workday Employee Portal](#)
- Track your laptop via [UPS My Choice](#) once you receive a confirmation email that it has shipped.
- Look for week 1 Get Started onboarding meeting details sent to your personal email the Wednesday prior to your start date

Background Information

Your offer is contingent on your background check clearing—any accidental misrepresentation on your application could lead to your disqualification from the position.

The Fidelity Investments background investigations process requires your full participation and cooperation, so please plan on providing accurate documentation such as W-2s, pay stubs, contact information, and transcripts if requested by our backgrounds team.

Employment dates, address history, disclosing current/open criminal investigation must be accurate as any omitted information may result in your offer being rescinded

Education and Employment

Do not indicate that you have graduated unless you have actually been awarded your degree or diploma. If you are completing your final course requirements, have had your degree or diploma withheld due to nonpayment of tuition, or for any other reason have not been awarded your degree or diploma, you should state that you do not have a degree on the application.

Your employment dates must be accurate. Any omitted employment from the application may result in your offer being rescinded. Please ensure you list the correct name of your previous or current employer. If you were self-employed, you will need to provide tax documentation of your self-employment.

Drug Test Appointment

You will receive an email with instructions about your drug screen. You may go to any Quest Diagnostics lab – visit the Quest website to find a location that is convenient for you.

*****Do this quickly:** once you receive the instructions, you must schedule and complete the drug test within 3 business days.

Fingerprinting Appointment

You will receive an email to schedule your fingerprinting apt at our regional center or remotely, depending on your location. If attending this apt at a Fidelity regional site, we will collect your I-9 form and corresponding identification. We may also take a photo for your badge ID. If you completing this remotely, you will receive additional information via email on how to complete your I9 and badge photo electronically.

Employment Eligibility

Section 1 of your I-9 form: You will receive an email to verify your employment through an electronic system.

Section 2 of your I-9 form: If you are attending a fingerprinting appointment in person [at a Fidelity site], you will complete section II of your I-9 during that appointment. Otherwise, you will receive instructions via email on how to submit documentation electronically

Additional Documentation

Depending on your circumstances, you may be asked for more information or documentation about your background over several weeks. Please respond to these inquires as soon as possible to ensure there are no delays. Monitor spam and junk email folders daily during this time to ensure no request gets lost.