Send a Document
Follow these instructions to send important documents, such as loan and withdrawal applications or consolidation forms, to Fidelity.*


2. Select, “Send a Document.”
   If you have multiple Fidelity accounts, you will be prompted to select one.

3. Select the type of document that you wish to send.
4. Select snap a photo.

5. The camera feature will open. Place your document flat on a dark surface in a well-lit area.

   Use the photo guides to center the document. Take the photo of the document when the guides turn green.

   If you are unsatisfied with your image, click, “Retake Photo,” in the top left-hand corner. For two-sided documents, take a picture of the other side by selecting, “Add Another.” When you are satisfied with your photo, click, “I’m Finished.”

   Please note that if you have not already granted the app permission to use your device’s camera you will receive a notification to grant permission. If you do not grant permission you cannot use the Send a Document feature.
6. A review screen will appear. Verify the transaction and the number of pages taken before hitting “Send.”

(You may also upload additional documents by selecting “Add Another Photo” before hitting “Send.”)

7. You will see a confirmation onscreen confirming your documents have been sent. Select “Done.”

All screenshots are for illustrative purposes.

*Please note that availability of this feature may vary based on your plan rules.

© 2018 FMR LLC. All rights reserved
Fidelity Brokerage Services LLC, Member NYSE, SIPC,
900 Salem Street, Smithfield, RI 02917
815331.3.0