Scheduling an Appointment with Fidelity

Step 1: Go to: **www.Fidelity.com/Schedule**

Step 2: Click "Schedule a time to meet"

Step 3: Look for "Appointment Search" near the top of the page. Just below this, there is a box where you can "Enter your employer name". Begin typing "University of New England". Once the University's name lists as a suggestion, click on the name.

Step 4: To the right of your employer name you should see a drop down box that states "Select Appointment Type", select your desired appointment type. Not all appointment types may be available.

Step 5: Choose a date by clicking on the calendar icon to the right of the appointment type or by clicking on "Next Available".

- Once you have found a date that works with your schedule, please click on the plus sign "+" to the right of "x Spot(s)".
- Click the time that best works with your schedule.

Note: If there is more than one consultant that works with your employer plan, you will see the consultant who has the next availability show up. If you would prefer to work with another consultant, please click "Next Available" to see if another consultant is available (you may have to click "Next Available" a few times depending on the availability of other consultants).

Step 6: The "Review & schedule" allows you to review that you have selected the correct date and time. Additionally, you will want to enter in your information. It is important that you put in the email you want the Zoom link being sent to if you are setting up a "Virtual Appointment" and the phone number you want to be called on if you are setting up a "Phone Appointment".

- Click "Schedule Appointment" at the bottom of the page once you have entered in all of the requested information.

Step 7: Please make sure to write down you appointment date and time to ensure you do not miss the upcoming appointment.

Note: Appointments may be booking a few weeks out. If you require more immediate assistance or assistance during a time that is not offered, our Planning and Advice Team and Account Service Teams are available. Neither require an appointment to meet

If you run into any issues while scheduling, please contact our Scheduling and Reservations Team.

Planning and Advice Team
Phone: 800-420-2363
Availability: Monday - Friday
8:30 AM - 8:30 PM ET

Account Service Team
Phone: 800-343-0860
Availability: Monday - Friday
8:00 AM - 12:00 AM ET

Scheduling and Reservations
Phone: 800-642-7131
Availability: Monday - Friday
8:00 AM - 12:00 AM ET