

## **Fidelity Account Information**

**Internet Access Instructions:** We're pleased to let you know that Fidelity has enhanced its website, Fidelity.com, to help make it easy for you to monitor all your Fidelity accounts through this single, secure site. You'll have access virtually 24 hours a day, 365 days a year to:

- Account aggregation so you can view all your account balances, holdings and transactions, including those our firm manages and views;
- Investor alerts about account transactions and balances; and
- Online delivery of account statements and trade confirmations to help save you time and stay organized.

**Getting Started:** If you are new to Fidelity.com, click Log In from the top menu bar, then go to New User Registration and follow the prompts.

To securely view and monitor your accounts on Fidelity.com, simply log in:

- Enter your Social Security Number or Customer ID (a unique identifier)
- Enter your PIN (Personal Identification Number)
- Click Login

**Reminder:** Advisor-managed accounts restrict your ability to make self-directed trades.

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To Wire Funds to your Fidelity Account:

Wire To:	JP Morgan Chase Bank, NY NY
ABA (Routing) Number:	021000021
For Credit To:	National Financial Services, LLC
Account Number:	066196-221
For The Benefit Of:	<b>Account Registration</b>
Fidelity Brokerage Account Number:	***_*****
SWIFT CODE: (use only if \$ is coming from a foreign bank)	CHASUS33

*Note: Incoming wires to qualified (retirement) accounts should be prefaced by contacting Amy at Beaumont with transaction details. Otherwise, the wire may be returned by Fidelity.*

Please make all checks intended for investment made payable to: **Fidelity Investments.**

Mail Checks To:

Amy Emkey		Fidelity Investments
Beaumont Financial Partners, LLC		PO Box 770002
20 Walnut Street, Suite 1	<b>OR</b>	Cincinnati, OH 45273-0074
Wellesley Hills, MA 02481		

**Remember to reference your account number on the check!**

FYI, any checks made out to Beaumont Financial Partners, LLC will be voided and returned.

If you have any questions please contact Amy Emkey at [aemkey@bfppartners.com](mailto:aemkey@bfppartners.com).

**Morgan Stanley Account Information**

To Wire Funds to your Morgan Stanley Account:

Wire To:	Citibank, NY
ABA (Routing) Number:	021000089
For Credit To:	Morgan Stanley & Co.
Account Number:	40611172
For Further Credit To:	<b>Account Registration</b>
Morgan Stanley Account Number:	<b>***_*****</b>

Please make all checks intended for investment made payable to: **Morgan Stanley**.

Mail Checks To:

Amy Emkey		The Livingstone Group
Beaumont Financial Partners, LLC		Morgan Stanley
20 Walnut Street, Suite 1	<b>OR</b>	125 High Street
Wellesley Hills, MA 02481		Boston, MA 02110

**Remember to reference your account number on the check!**

FYI, any checks made out to Beaumont Financial Partners, LLC will be voided and returned.

If you have any questions please contact Amy Emkey at [aemkey@bfpartners.com](mailto:aemkey@bfpartners.com).