

Completing your Participant Agreement

A quick-start guide for stock plan participants.

Your company stock plan can be an important benefit for you—but only if you complete your Participant Agreement. Just follow these easy steps.

Fidelity NetBenefits

Log In

Customer ID*/SSN
[Forgot Your Customer ID?](#)
 Remember Me

PIN
[Forgot Your PIN?](#)

New User
[New User Registration](#) for customers who have never logged in.
[Not sure if you're already a registered user?](#)

Manage Your Login
Change your Customer ID and PIN in Your Profile periodically to keep them secure.

- [Create or Change Your Customer ID](#)
- [Change Your PIN](#)
- [Reset a Forgotten or Blocked PIN](#)

[Log in to NetBenefits Worldwide](#)

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Covered, in part, by U.S. patent number 5,991,878
Brokerage Products and Services are offered through Fidelity Brokerage Services LLC, Member NYSE, SIPC.

Screenshot is for illustrative purposes only.

Fidelity NetBenefits

Log In

Participant Number*
PIN
[Forgot Your PIN?](#)

New User
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Manage Your Login
Change your PIN periodically to keep it secure.

- [Change Your PIN](#)
- [Reset a Forgotten or Blocked PIN](#)

[Log in to NetBenefits US](#)

[How to contact a NetBenefits Worldwide Services Representative](#)

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1. Type **netbenefits.fidelity.com** into your browser address bar

2. Click *Log in to NetBenefits Worldwide*

3. Click on **New User Registration** and follow the instructions to create a PIN—you will be required to enter your:

- Participant Number (provided by Fidelity Stock Plan Services)
- Employee ID (provided by your employer)
- Date of birth

4. Return to the Log In page, enter your Participant Number and PIN, and click *Log In*

Fidelity NetBenefits Log Out | Contact Us

Plan Summary News & Quotes Customer Service

Plan Summary [Help](#) | [Glossary](#) | [Print This Page](#)

Total Net Worth: \$50,000.00*		
THETA CORP.	\$10,000.00	Activation Required
Activate All Plans		
THETA STOCK OPTIONS PLAN	\$30,000.00	
THETA EMPLOYEE STOCK PURCHASE Plan	\$10,000.00	
STOCK PURCHASE PLAN A		
EMPLOYEE STOCK PURCHASE Plan		

Market Update

DJIA	11,480.45	↓ -0.55%
NASDAQ	2,338.72	↓ -1.22%
S&P 500	1,272.67	↓ -0.79%
NIKKEI 225	12,609.47	↓ -1.75%
CSCO*	24.0500	0.00

Related Links

- [Quick Quote](#)
- [Currency Conversion](#)
- [Tax Certification Forms](#)
- [Translated Website Guides](#)

Screenshot is for illustrative purposes only.

5. To start managing your plan, you must complete your **Participant Agreement** online, which will include the necessary W-8BEN tax certification

From the Plan Summary screen, click *Activate All Plans*

Fidelity NetBenefits

Activate Your Stock Plan Services Participant Trust

Activate Your Stock Plans

Welcome to Stock Plan Services

As part of your Company Stock Plan¹ a Participant Trust has been established for your company's Equity Compensation Plan.

To access your Stock Plans please complete this activation process online now². Without a completed participant agreement on file, online access to your participant trust will be restricted and you may be subject to additional IRS tax withholding.

The Participant Trust

Use this to: View the Stock Plan provided to you by your employer, model your value or process a plan transaction.

[Return to Plan Summary](#) [Complete the Activation Online](#)

1 May include Stock Option, Employee Stock Restricted Stock, and/or Stock Appreciation Rights/Phantom Stock plan(s).
2 This activation process replaces the participant agreement you may have received in your welcome kit.

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6. Click **Complete the Activation Online**

Step 1 of 3: Provide Beneficial Participant Owner Information

Participant Beneficial Owner Information

Review your personal information and enter your date of birth and tax status. Please call a Stock Plan Services (SPS) Representative regarding any changes to the information presented below. (1-800-544-0275)

Participant Beneficial Owner

First Name: JOSEPH
 Middle Name: S
 Last Name: PARTICIPANT

Name of Participant Trust

Participant Trust: SPS Participant Trust - Theta Corporation

Mailing Address¹

Street, apt or suite number, or rural route: 123 ANYWHERE LANE
 City or Town: HERTFORDSHIRE
 State or Province / Foreign County: HT
 Postal Code: AL 60RW
 Country: UNITED KINGDOM

Note: For W8 Certification, additional documentation and written explanation is required if the mailing address is listed in the United States.

Permanent Residence Address
 Do not use a P.O. Box or In-care-of Address

Check here if mailing address is the same as your permanent address

Address Line 1:
 Address Line 2:

City / Town:
 State / Province:
 Country:
 Postal Code:

7. Enter your **Beneficial Owner Information**

Taxpayer Identif
 Enter your Soc individual taxp (ITIN)

Enter your Date
 (MM/DD/YYYY)

Select Your Co
 Citizenship

Select Your Tax
 For the purpose resident alien.

If this does n Not a US Pe

Select Your Tax Status - W8/W9 Certification

For the purpose of this certification, you are a US Person if you are a US citizen or a US resident alien.

- If this does not apply to you (i.e., if you are not a US Person), select and complete "I am Not a US Person (W8 Certification)" below.
- If this applies to you, select and complete "I am a US Person (W9 Certification)" below.

To learn more about US tax certification, as well as what is meant by permanent resident address and beneficial ownership², go to the US Internal Revenue Service website (www.irs.gov). To update your US tax certification using a downloaded and completed IRS form, mail it to:

Fidelity Stock Plan Services
 P.O. Box 770001
 Cincinnati, OH 45277-0002

I am NOT a US Person (W8 Certification)

I certify that I am a resident of:

Select your country:

within the meaning of the income tax treaty between the United States and that country.

Under the penalties of perjury, I declare that I have examined the information provided herein and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that: 1) I am the beneficial owner (or am authorized to sign for the beneficial owner) of all income to which this certification relates; 2) The beneficial owner is not a U.S. person; 3) The income to which this certification relates is (a) not effectively connected with the conduct of a trade or business in the United States, (b) effectively connected but is not subject to tax under an income tax treaty, or (c) the partner's share of a partnership's effectively connected income; and 4) For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions of Form W-8BEN.

Furthermore, I authorize this certification to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner.

I CERTIFY THAT I AM AN INDIVIDUAL

The Internal Revenue Service does not require your consent to any provisions of this document other than the certifications required to establish your status as a non-U.S. person and, if application, obtain a reduced rate of withholding.

CHECK THIS BOX TO SIGN YOUR W-8BEN CERTIFICATION

I am a US Person (W9 Certification)

Under penalties of perjury, I certify that:

- The social security number (SSN) or individual tax identification number (ITIN) provided is my correct SSN or ITIN (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. person (including a U.S. resident alien)
 - Check this box if you must strike item 2 above because you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

CHECK THIS BOX TO SIGN YOUR W-9 CERTIFICATION

< Previous Next >

Review Information

and certify your **Tax Status**, then click *Next*

Screenshots are for illustrative purposes only.

Fidelity NetBenefits®

Activate Your Stock Plan Services Participant Trust

✔ **Step 2 of 3: Verify Your Personal Information**

Participant Beneficial Owner Information ◀

• After you verify this information please print a copy for your records.

Verify Your Information [Print This Page](#)

Owner Information Edit	
SPS Trust Name	SPS PARTICIPANT TRUST-THETA CORP.
Legal Name	JOSEPH S PARTICIPANT
Mailing address	123 ANYWHERE LANE HERTFORDSHIRE AL 60RW UNITED KINGDOM
Permanent address	123 ANYWHERE LANE HERTFORDSHIRE AL 60RW UNITED KINGDOM
Taxpayer identification number	
Date of birth (MM/DD/YYYY)	01 / 01 / 1955
Tax certification election	W8 Certified
Certification date (MM/DD/YYYY)	08 / 26 / 2010
Country of tax residence	UNITED KINGDOM
Country of citizenship	UNITED KINGDOM
Certified as an individual	Yes
Electronic signature collected	Yes

< Previous Next >

Participant Information Agree to Terms

8. Verify your **Beneficial Owner Information**, then click **Next**

Screenshot is for illustrative purposes only.

Fidelity NetBenefits®

Activate Your Stock Plan Services Participant Trust

✔ **Step 3 of 3: Agree to Terms**

Agree to Terms

Terms of Agreement ◀

You are required to read the [Customer Agreement](#) and check the box on the application page.

"I certify that I have read the Participant Agreement and agreed to the terms and conditions." Your acceptance of the Participant Agreement will not be final until you click "I Agree".

< Previous I Agree ◀

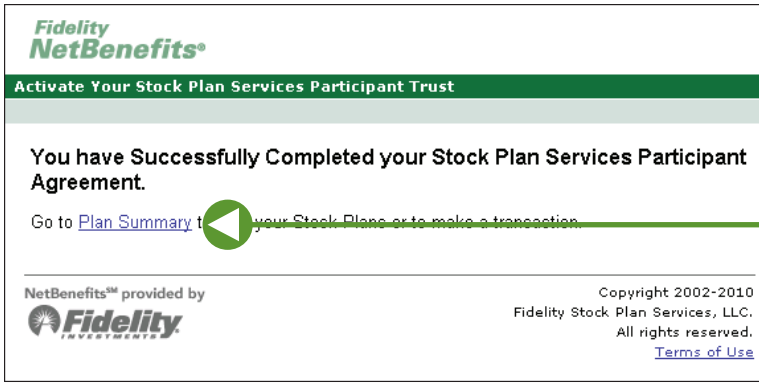
Review Application Click I Agree to Agree to Terms and go to Confirmation

9. Review the **Terms of Agreement**

Certify that you have read the Terms of Agreement and agree to the terms by clicking the appropriate box

10. Click **I Agree**

Screenshot is for illustrative purposes only.



You have completed your **Participant Agreement**

11. Click *Plan Summary* to get back to the main page

Screenshot is for illustrative purposes only.

When you reach this point, you have successfully completed your Participant Agreement and are ready to take advantage of all the benefits your stock plan has to offer.