



Open Banking Update: Fidelity

We are pleased to let you know that we will be converting in-scope Fidelity accounts to the Akoya open banking API on August 23, 2023. As always, once accounts are migrated, after this date, users will need to re-authenticate and consent to aggregation in order for accounts to continue aggregating successfully.

The Open Banking API will allow us to aggregate Fidelity data more efficiently and reliably with less disruption due to site changes and site restrictions on aggregation traffic times.

Please see details below for specific institution details as well as answers to commonly asked questions. You must have signed our Financial Institution Data Access (FIDA) Addendum in order to utilize Open Banking API channels.

Fidelity Open Banking API FAQ

1. Which existing Fidelity FIs are in scope for Open Banking API enablement and migration?

Existing FI ID	Existing FI Name	New FI ID	New FI Name
20268	Fidelity.com (Investment)	113552	Fidelity (Investment)
22	Fidelity.com - Quicken (Investment)		
183	Fidelity NetBenefits (Investment)		
52942	Fidelity NetBenefits - Quicken (Investment)		
44892	Fidelity Charitable Gift Fund (Investment)		

2. Which login types are in scope? Can third party logins be aggregated (aka delegate/LPOA/Agent access)?

- No. Fidelity only allows the primary account holder to engage in aggregation services. LPOA or delegate users are not supported on the API currently.

3. When will new accounts configured be able to use the API?

- August 14, 2023

4. When will full account migration of existing accounts occur?

- August 23, 2023