



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 September 6, 2023. Once the migration has been completed, users will need to edit the credentials in the aggregation system, select the Save and Authorize button, and follow Fidelity’s authentication and consent process to keep accounts aggregating.

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 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 supported? Can third party logins use aggregation (aka delegate/LPOA/Agent access)?

- No. Fidelity only allows the primary account owner to directly engage and consent for aggregation services. Agents/advisors with LPOA/delegate access are not supported on the API currently. These users will need to work with the primary account owner to have them set up their own account for aggregation.

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?

- September 6, 2023