

## ***Instructions on how to get a Fidelity Bond online***

For more information about Fidelity Bonds:

1. Go to [www.colonialdirect.com/fidelity\\_main.asp](http://www.colonialdirect.com/fidelity_main.asp)
2. Hover your mouse over Products at the top of the page
3. In the drop down menu click on Fidelity Bond for Plan Sponsors
4. Click the Next button at the bottom of the page for information about ERISA Fidelity Bonds

To purchase the Fidelity Bond:

1. Go to [www.colonialdirect.com/fidelity\\_main.asp](http://www.colonialdirect.com/fidelity_main.asp)
2. Hover your mouse over Get Direct Coverage at the top of the page
3. In the drop down menu click on Services for Plan Sponsors
4. Click on Click here to apply for ERISA/Fidelity Bond and Fiduciary Liability Insurance
5. Complete the information requested (use Referral Code NY0474) on the New Account Sign Up page, then click on Sign Up
6. Fill out the Check-list with the appropriate answers. Be sure to answer “Yes” to *Is the ERISA/fidelity bond for a single-employer plan?* and *Do the plan(s) conform to the standards of eligibility, participation, vesting, investment diversification, funding, and all other provisions of ERISA?* Then click Submit.
7. Complete the ERISA Fidelity Bond Application.
8. After you have purchased the Bond, print a copy of the receipt and send a copy to us.