**[Engaged - Age 36-54]**
[Sample final CTA variation: Juggler]

**Subject:** Is your financial protection up to date?
**Preheader:** FidBits: Resources to help you protect what you've built.

Fidelity INVESTMENTS

[Firstname] [Lastname]

Secure login

# FidBits

Helping you make the most of your workplace benefits and your money.

### Help protect what matters most

Life doesn't stand still. Neither should your financial protection. Explore how insurance, wills, beneficiary designations, and other essentials can help protect your loved ones and long-term plans.

Get started



### Get to know your credit card

Credit cards can help you build credit, earn rewards, and make everyday purchases easier. Understanding how they work can help you maximize the benefits while avoiding costly mistakes.

### Support the causes that inspire you

Giving can be even more meaningful when it reflects your values. Our 4 steps to charitable giving can help you define your priorities, create a plan, and make a greater impact.

### Hit reset on your money routine

If your current money strategy could use a refresh, sometimes a new perspective can make all the difference. Join our live money management webinar to explore practical ways to help you take your next step.

**91% of past webinar participants said they left feeling confident about what to do next.[1]**



1. Fidelity Workplace Investing, Customer Experience Index Survey, feedback collected in September 2025 from webinar attendees.

### When did you last review your beneficiaries?

Your beneficiaries are the people or organizations you've chosen to receive your savings when you pass away. How you set them up on your accounts plays an important role in your estate planning—and may even override what's written in your will. Taking a few minutes to review each account today could spare your loved ones confusion later.

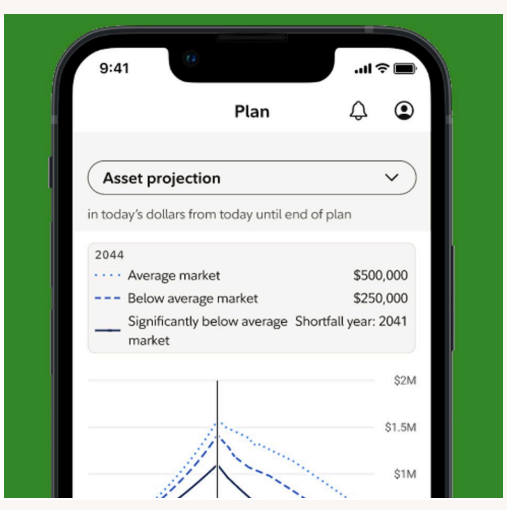
### Peace of mind starts with a plan

Estate planning can help protect your family and your wishes. Simple steps, like creating a will and naming a power of attorney, can help you feel more prepared for the future. Explore 5 ways to get started.

### Keep building your financial foundation

Your financial wellness dashboard connects your goals, savings, and financial priorities in one place, helping you continue moving forward with confidence.

Visit your dashboard




The **NetBenefits® app** gives you more ways to access and manage your employee benefits. Download now.

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