[Engaged - Age 55+]
[Sample final CTA variation: Non-Juggler 55+]

Subject: Help protect the people you care about
Preheader: FidBits: Explore steps that can help protect your wishes and support the people you care about.

[Firstname] [Lastname]

Secure login

FidBits

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

Help protect your legacy

Protecting what matters most can take many forms. Explore how insurance, beneficiary designations, and estate planning can help safeguard your financial future and support the people you care about.

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.

Check in on your retirement readiness

Visit your financial wellness dashboard to review your retirement progress and identify next steps that can help support the future you're planning.

Visit your dashboard

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

Download on the App Store | GET IT ON Google Play

App Store is a registered service mark of Apple Inc.
Google Play is a registered trademark of Google LLC.

Investing involves risk, including risk of loss.

This information is intended to be educational and is not tailored to the investment needs of any specific investor.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

Some Fidelity products and services are offered separately from your employer-sponsored retirement plan.

Screenshots are for illustrative purposes only.

Third-party trademarks and service marks are the property of their respective owners. All other trademarks and service marks are the property of FMR LLC or an affiliated company, and may be registered.

The information in this email is intended solely for the attention and use of the named addressee. This message or any part thereof must not be disclosed, copied, distributed, or retained by any person without authorization of the addressee.

Please do not respond to this email. This mailbox is not monitored, and you will not receive a response.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917
© 2026 FMR LLC. All rights reserved.

1281620.1.0

Privacy Policy | Terms of Use | View in browser