18-35 years old, touch 1

Subject: Add missing info to your retirement savings plan

Preheader: Assigning a beneficiary ensures that you control where your savings go.

Fidelity INVESTMENTS

[Firstname] [Lastname]
[Clientname]

Español

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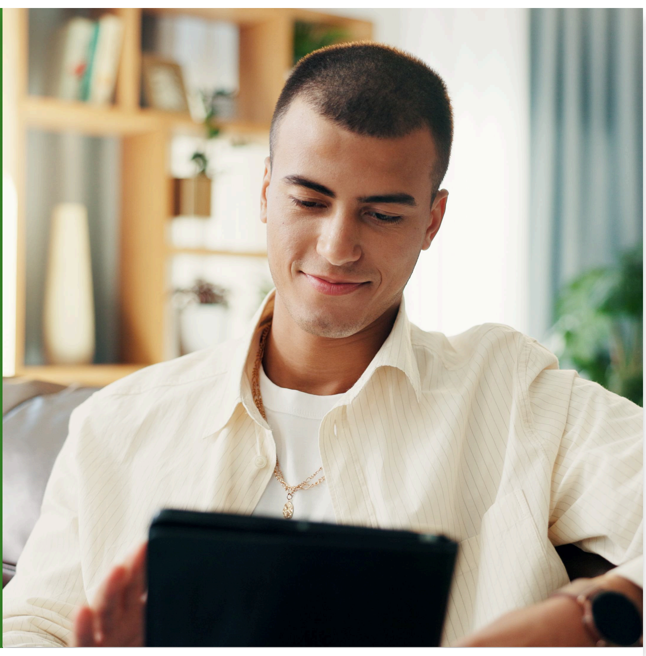
Name a beneficiary to help control your savings



You've made the smart decision to participate in your retirement savings plan. Now make another smart move—assign a beneficiary. A beneficiary is the person or organization you name to receive your savings in the event of your passing.

Adding a beneficiary is quick, easy, and protects your savings from unexpected hurdles down the road.

Add a beneficiary

Did you know: Beneficiaries need to be assigned to each Fidelity account individually. They don't carry over between accounts.

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For online beneficiary designations that require spousal consent, you will be prompted to print and return a signed and notarized spousal consent form by mail.

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1245201.1.0

18-35 years old, touch 2

Subject: You need to take action on your retirement savings plan

Preheader: Assigning a beneficiary is simple, quick, and puts you in control of your savings.

Fidelity INVESTMENTS

[Firstname] [Lastname]
[Clientname]

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Adding a beneficiary to your retirement savings is essential

Setting up a beneficiary ensures that you're in control of your savings even in the event of your passing. A beneficiary can be a person or people close to you, like your spouse, children, parents, family members, and friends; or a trust, an estate, or your favorite charity.

Adding a beneficiary is quick, easy, and protects your savings from unexpected hurdles down the road.

Add a beneficiary

Did you know: Naming a beneficiary to one Fidelity account won't attach it to your others.

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36-55 years old, touch 1

Subject: Add missing info to your retirement savings plan

Preheader: Assigning a beneficiary helps ensure your savings goes where you want it to.

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[Firstname] [Lastname]
[Clientname]

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Help control your savings in the future —name a beneficiary today

Your retirement savings plan is missing a beneficiary. A beneficiary is a person or organization you name to receive your retirement savings in the event of your passing. Assigning a beneficiary can help ensure that your savings go where you intend.

Adding a beneficiary is quick, easy, and protects your savings from unexpected hurdles down the road.

Add a beneficiary

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36-55 years old, touch 2

Subject: You need to take action on your retirement savings plan

Preheader: Assigning a beneficiary is simple, quick, and puts you in control of your savings.

Fidelity INVESTMENTS

[Firstname] [Lastname]
[Clientname]

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Name a beneficiary and help control where your money goes

You can't predict the unexpected, but you can be ready for it. Assigning a beneficiary ensures your retirement savings go where you intend. A beneficiary is a person or organization you name to receive your savings in the event of your passing.

Your retirement savings plan is missing a beneficiary. Naming a person or organization as your beneficiary to protect your savings only takes a few details and a few minutes.

Add a beneficiary

Did you know: Naming a beneficiary to one Fidelity account won't attach it to your others.

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Subject: Add missing info to your retirement savings plan

Preheader: Assigning a beneficiary is easy, quick, and essential.

56+ years old, touch 1

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[Clientname]

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Name a beneficiary and leave a legacy, not paperwork

Your retirement savings account is missing a beneficiary. That means the people you care about may not receive your retirement savings in the event of your passing.

Assigning a beneficiary is quick, easy, and can help avoid unexpected hurdles when your savings are distributed.

Add a beneficiary

Questions? Call <plan toll-free number> for help adding your beneficiary.

Did you know: Beneficiaries need to be assigned to each Fidelity account individually. They don't carry over between accounts.

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Subject: You need to take action on your retirement savings plan

Preheader: Assigning a beneficiary is simple, quick, and puts you in control of your savings

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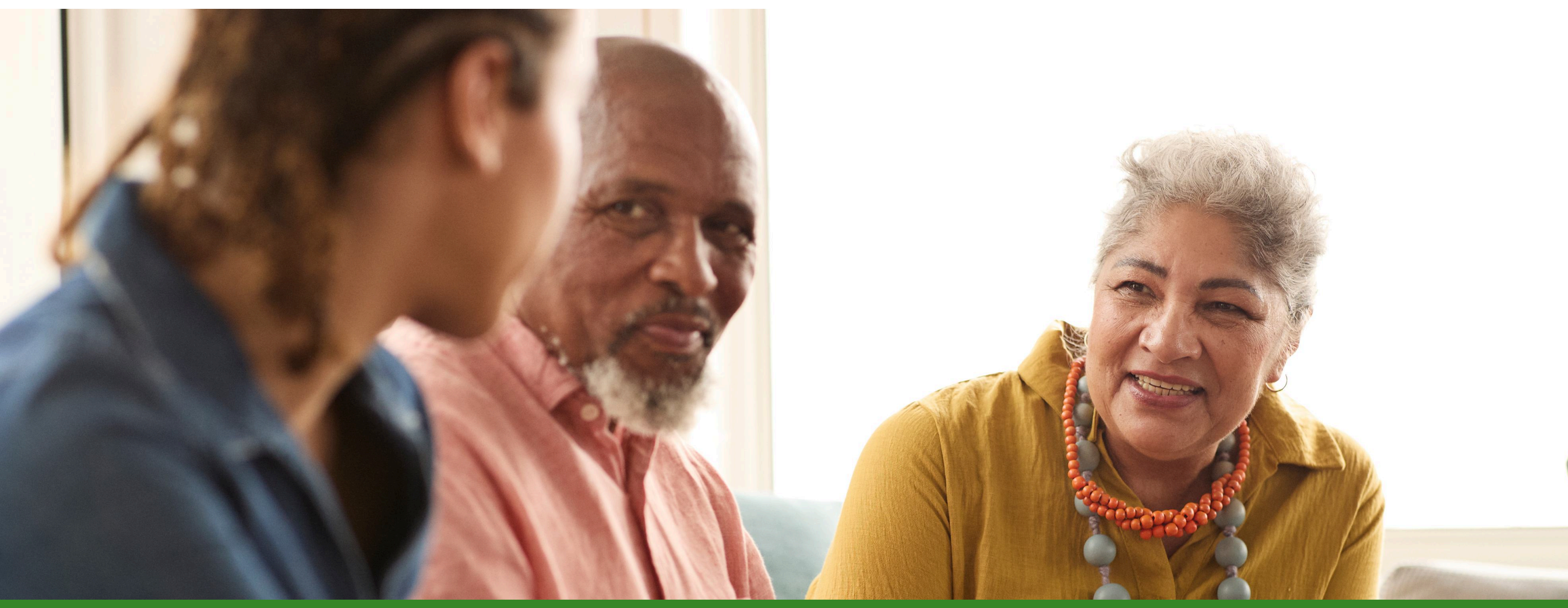

Your retirement savings account is missing a beneficiary

Naming a beneficiary puts your retirement savings in the hands of loved ones like your spouse, children, family members, and friends in the event of your passing. It can also go to a trust, an estate, or your favorite charity. Assigning a beneficiary is quick, simple, and can help avoid unexpected hurdles when your savings are distributed.

Much in life you can't control, but you can help make life easier for your loved ones.

Add a beneficiary

Questions? Call <plan toll-free number> for help adding your beneficiary.

Did you know: Naming a beneficiary to one Fidelity account won't attach it to your others.

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