

# Investment Help/Professional Management Campaign



# Campaign Overview

# Campaign Overview

## Our goal

Drive awareness and education about the importance of saving for retirement with a message that highlights strategies where an investment professional can take on the responsibility of managing a participant's retirement savings through a managed account or single fund approach.

## Who's included

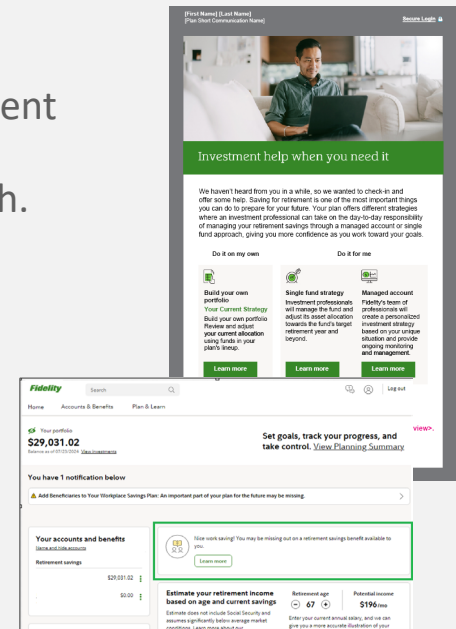
All active and term participants in plans that offer Fidelity's managed account service who are not enrolled and investing on their own.

## How we'll communicate

This multi-channel campaign includes an email and NetBenefits® messaging.

## When

Week of October 28, 2024



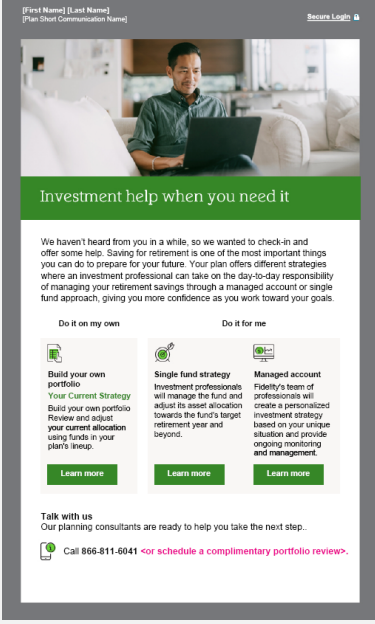
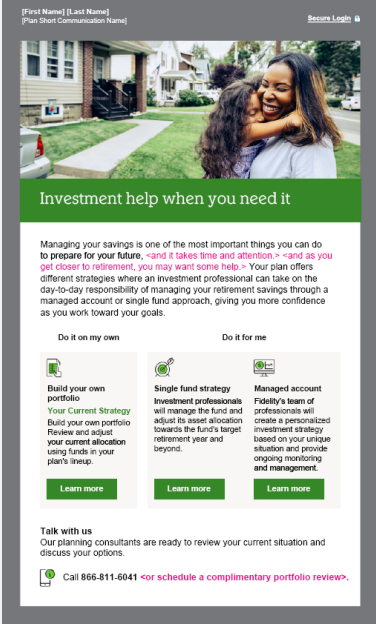
# Campaign Cadence

# Campaign Materials

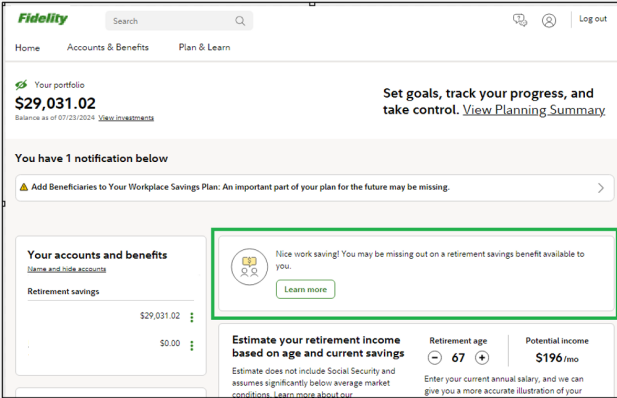
A multi-channel communications program that includes email and NetBenefits® messaging.

Email  
Sent week of Oct. 28, 2024

Standard or Unengaged



NetBenefits®



Participant will receive one email

# Email Samples and Links

# Email Sample 1


## Standard version

### Targeted content:

- **For 39 years old and younger:**  
<and it takes time and attention>
- **For 40 years old and older:**  
<and as you get closer to retirement, you may want some help.>


**SUBJECT LINE:** Investment help that works for you  
**PRE-HEADER:** Take the guesswork out of saving for retirement.

View in your browser

 W CLIENT LOGO SPACE  
2024/15 max




[First Name] [Last Name] [Secure Login](#)

[Plan Short Communication Name]




### Investment help when you need it

Managing your savings is one of the most important things you can do to prepare for your future, <and it takes time and attention.> <and as you get closer to retirement, you may want some help.> Your plan offers different strategies where an investment professional can take on the day-to-day responsibility of managing your retirement savings through a managed account or single fund approach, giving you more confidence as you work toward your goals.

Do it on my own	Do it for me	
 <p><b>Build your own portfolio</b> <b>Your Current Strategy</b> Build your own portfolio Review and adjust your current allocation using funds in your plan's lineup.</p> <p><a href="#">Learn more</a></p>	 <p><b>Single fund strategy</b> Investment professionals will manage the fund and adjust its asset allocation towards the fund's target retirement year and beyond.</p> <p><a href="#">Learn more</a></p>	 <p><b>Managed account</b> Fidelity's team of professionals will create a personalized investment strategy based on your unique situation and provide ongoing monitoring and management.</p> <p><a href="#">Learn more</a></p>

**Talk with us**  
Our planning consultants are ready to review your current situation and discuss your options.

 Call 866-811-6041 <or schedule a complimentary portfolio review>.

Download the free NetBenefits® app to manage your accounts whenever—and wherever—you want. Learn more about what the app can do for you.



Investing involves risk, including risk of loss.

[Privacy Policy](#) | [Terms of Use](#)

**Please do not respond to this email. This mailbox is not monitored, and you will not receive a response. This information is intended to be educational and is not tailored to the investment needs of any specific investor.**

Diversification and asset allocation do not ensure a profit or guarantee against loss.

Target date funds are an asset mix of stocks, bonds, and other investments that automatically becomes more conservative as the fund approaches its target retirement date and beyond. Principal invested is not guaranteed.

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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.

Your workplace benefits account is currently set to send emails of the following type: Education and Guidance—Savings & Retirement. To change this email setting, click: Stop receiving emails of this type. Note: You will be required to log in to NetBenefits.

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# Email Sample 2


## Unengaged version


(participants who have not logged in or contacted Fidelity for at least one year)

**SUBJECT LINE:** It's been a while—time to check in on your investments  
**PRE-HEADER:** Take the guesswork out of saving for retirement.

[View in your browser](#)




 W CLIENT LOGO SPACE  
200x75 max

[First Name] [Last Name] [Secure Login](#)   
[Plan Short Communication Name]




### Investment help when you need it

We haven't heard from you in a while, so we wanted to check-in and offer some help. Saving for retirement is one of the most important things you can do to prepare for your future. Your plan offers different strategies where an investment professional can take on the day-to-day responsibility of managing your retirement savings through a managed account or single fund approach, giving you more confidence as you work toward your goals.

Do it on my own	Do it for me	
 <b>Build your own portfolio</b> <b>Your Current Strategy</b> Build your own portfolio Review and adjust <b>your current allocation</b> using funds in your plan's lineup. <a href="#">Learn more</a>	 <b>Single fund strategy</b> Investment professionals will manage the fund and adjust its asset allocation towards the fund's target retirement year and beyond. <a href="#">Learn more</a>	 <b>Managed account</b> Fidelity's team of professionals will create a personalized investment strategy based on your unique situation and provide ongoing monitoring and management. <a href="#">Learn more</a>

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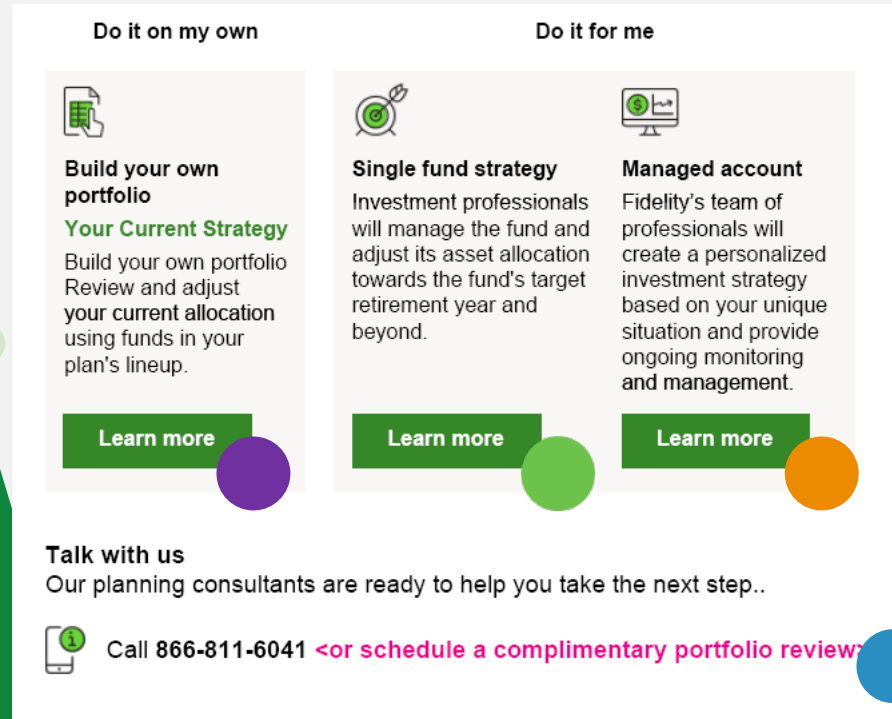
# Email Links

on both versions

Provides available investment strategy options or call to speak with a licensed professional

Links and calls to action:

-  **Change investments page**
-  **PP&A eligible landing page**
-  **Investment performance & research page**
-  **Appointment scheduler**  
*(participants can schedule an appointment if they have \$100,000 or more in assets)*



The screenshot displays an email layout with two main columns: "Do it on my own" and "Do it for me".


**Do it on my own**

- Build your own portfolio**  
**Your Current Strategy**  
Build your own portfolio Review and adjust your current allocation using funds in your plan's lineup.  
[Learn more](#)

**Do it for me**

- Single fund strategy**  
Investment professionals will manage the fund and adjust its asset allocation towards the fund's target retirement year and beyond.  
[Learn more](#)
- Managed account**  
Fidelity's team of professionals will create a personalized investment strategy based on your unique situation and provide ongoing monitoring and management.  
[Learn more](#)

**Talk with us**  
Our planning consultants are ready to help you take the next step..

 Call 866-811-6041 [<or schedule a complimentary portfolio review>](#)

# Destination webpages

# Change Investments Page

Summary Contributions **Investments** Withdrawals/Loans Rollovers Bank/Tax Information Plan Information

PERFORMANCE & RESEARCH | INVESTMENT STRATEGIES | PERSONALIZED PLANNING & ADVICE **CHANGE INVESTMENTS**

### Investment Elections

**i** Your plan's default investment percentages for Source Group 1 are prefilled below. You can make changes to these percentages before completing your future investment elections.

**Learn About Investing**

- [How to invest your contributions](#)
- [What is a source?](#)

**Your Current Investment Elections**

For any future contributions that you make, your money will be invested in your current elections, shown in the table below. Your contribution sources are all invested the same way, with the same fund choices and percentages applied to each of the following:

- Source Group 1

**Current Investment Elections**

Asset Class	Subclass	Fund Name	Current %
Blended Investment	--	<a href="#">TRP RETIRE 2035 I</a>	100%
			<b>Total: 100%</b>

**Change Your Investment Elections**

If you would like your future contributions to be invested differently, choose one of the options available below.

# Personalized Planning & Advice Eligible Landing Page

Fidelity® Personalized Planning & Advice Questions? 866-811-6041 [View my proposal](#)


1 Unsure if Personalized Planning & Advice\* is right for you? Fidelity's broad range of planning strategies are designed to meet the needs of every investor. [Explore other ways we can help.](#)

1 <Client Name> has recently added Personalized Planning & Advice, a managed account, to your plan options. If you choose to enroll, we'll keep your investment strategy aligned to your goals to help you stay on track for retirement. If you choose not to enroll, you'll remain in your current [investment strategy](#). Learn more below or call 866-811-6041 to see if Personalized Planning & Advice is right for you.


## Fidelity® Personalized Planning & Advice

A personalized investment strategy designed to help you manage your retirement goals.

[View my proposal](#)

 Sign up by March 13 and receive a 50% discount off the net advisory fee for 180 days.

### Put Fidelity's retirement experience to work for you



**A team of experienced professionals will work to help you reach your retirement goal**

- We work with you to build a plan for your retirement
- We professionally manage your retirement savings
- We reach out to you periodically to discuss your progress

[Prepare my proposal](#)


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#### Personalized retirement planning for you

Our team of licensed Fidelity representatives will take time to understand your financial picture, including:

- A review of your personal situation including factors like your risk tolerance, how much you've saved, and how long your money will need to last
- Access to a planning dashboard and quarterly email check-ins to track your progress against your retirement goals

Want a free review of you plan? Talk to one of our financial representatives to learn more. Call **866-811-6041**.




# Investment Performance & Research Page

Summary Contributions **Investments** Withdrawals Rollovers Bank/Tax Information Plan Information

PERFORMANCE & RESEARCH INVESTMENT STRATEGIES PERSONALIZED PLANNING & ADVICE CHANGE INVESTMENTS BROKERAGELINK®

## Investment Performance & Research

How can we help you choose and manage investments?



### Explore a few different ways to manage your money

Call 866-811-6041 and ask for help retirement planning or visit our [Planning Summary](#).

#### Single fund strategy


Choose a single, diversified solution that automatically adjusts over time to align your asset mix with a target retirement year.  
[Learn more](#)

Fund expenses apply

Select single fund strategy

#### Managed account

Get an investment strategy built with you in mind and ongoing support to help keep you on the right track.

Fund expenses apply  
[Advisory fee applies](#) 

Select managed account

#### Do it yourself

Build and manage your own portfolio strategy by choosing from an investment lineup selected by your plan.  
[Refresh your retirement plan](#)

Fund expenses apply

Choose my own investments

# Appointment Scheduler

Planning & Advice      News & Research      Products

## Availability of Fidelity Planning Consultants

Select a date and time for a **30 minute phone appointment**

Select date Time shown in: Central Time

	Mon Jan 22	Tue Jan 23	Wed Jan 24	Thu Jan 25	Fri Jan 26
7:30 AM	7:30 AM	7:30 AM	7:30 AM	7:30 AM	7:30 AM
8:00 AM	8:00 AM	8:00 AM	8:00 AM	8:00 AM	8:00 AM
8:30 AM	8:30 AM	8:30 AM	8:30 AM	8:30 AM	8:30 AM
9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM
9:30 AM	9:30 AM	9:30 AM	9:30 AM	9:30 AM	9:30 AM
10:00 AM	10:00 AM	10:00 AM	10:00 AM	10:00 AM	10:00 AM
10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM
11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM

# Important Information

## Investing involves risk, including risk of loss.

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Screenshots and graphics are hypothetical and for illustrative purposes only.

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Effective March 31, 2025, Fidelity Personal and Workplace Advisors LLC (FPWA) will merge into Strategic Advisers LLC (Strategic Advisers). Any services provided by FPWA as described above will, as of March 31, 2025, be provided by Strategic Advisers. FPWA and Strategic Advisers are Fidelity Investments companies.

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