Investment Help/Professional Management Campaign

Fidelity INVESTMENTS

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

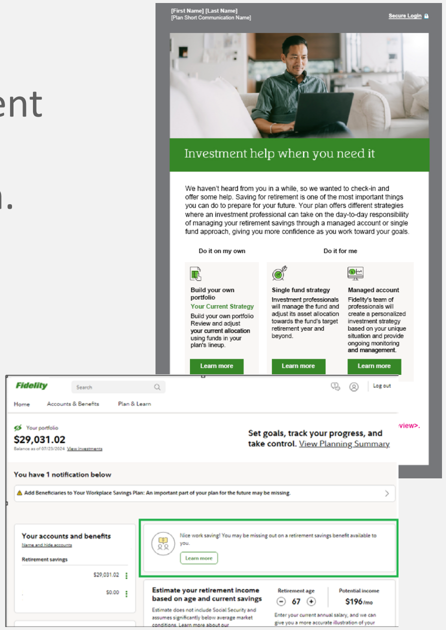
All active and term participants in plans that offer Fidelity's managed account service who are not enrolled and investing on their own.

How we'll communicate

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

When

Week of October 28, 2024



Screenshots, content, and graphics are for illustrative purposes only

Campaign Cadence

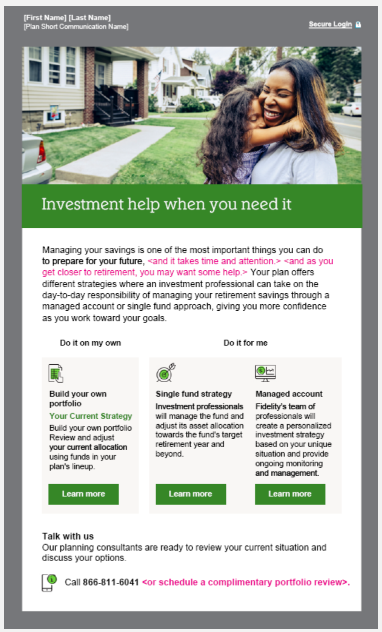
Campaign Materials

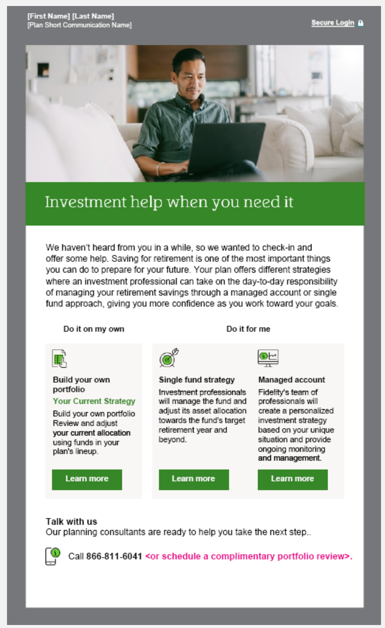
A multi-channel communications program that includes email and NetBenefits® messaging.

Email

Sent week of Oct. 28, 2024

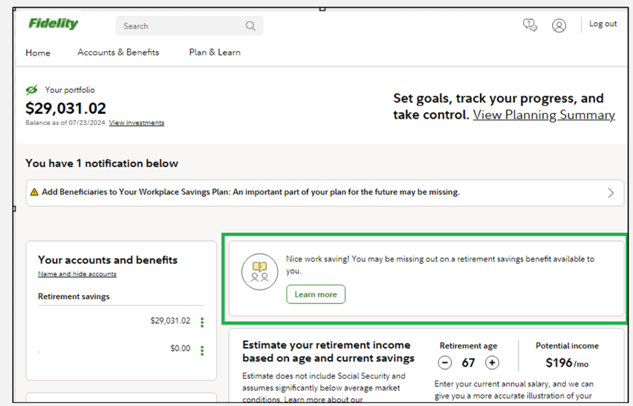
Standard *or* *Unengaged*





Participant will receive one email

NetBenefits®



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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

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

[First Name] [Last Name]
[Plan Short Communication Name]

Secure Login

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

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 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.

Download on the App Store | GET IT ON Google Play

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.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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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

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

[First Name] [Last Name]
[Plan Short Communication Name]

Secure Login

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.

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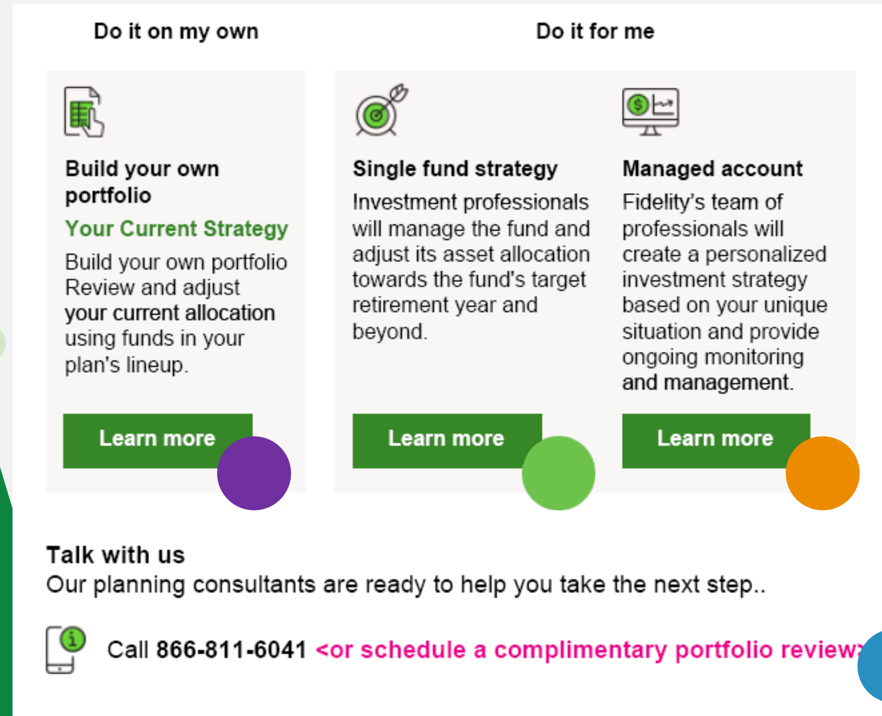
Email Links

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)



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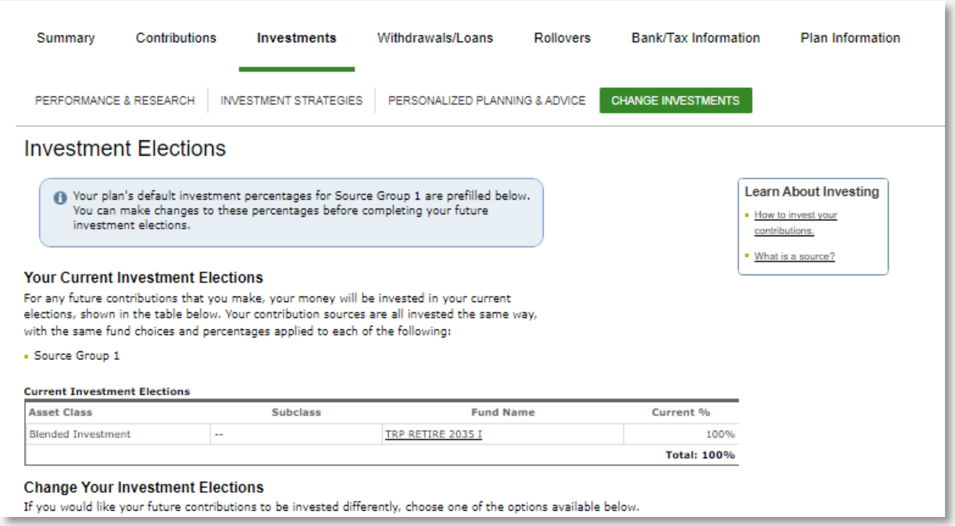
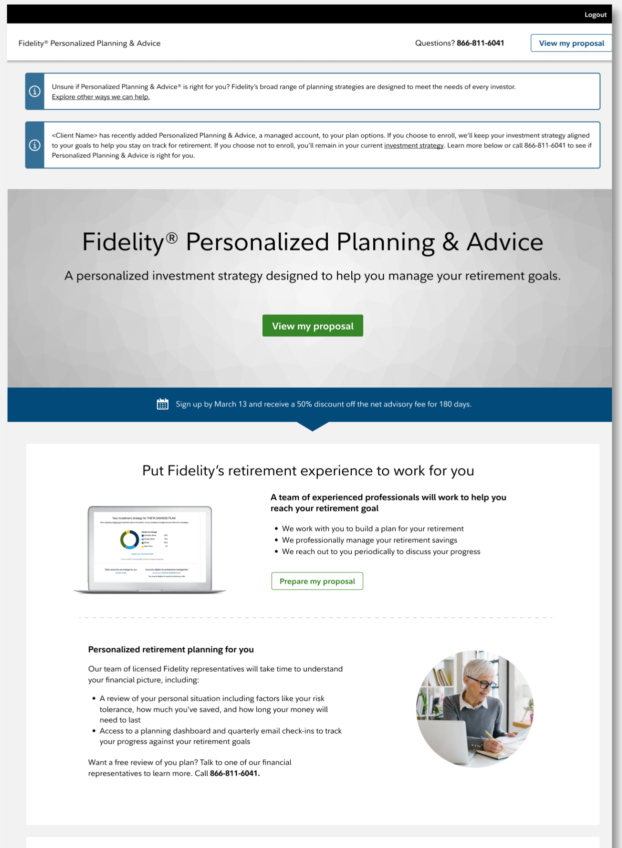
Destination webpages

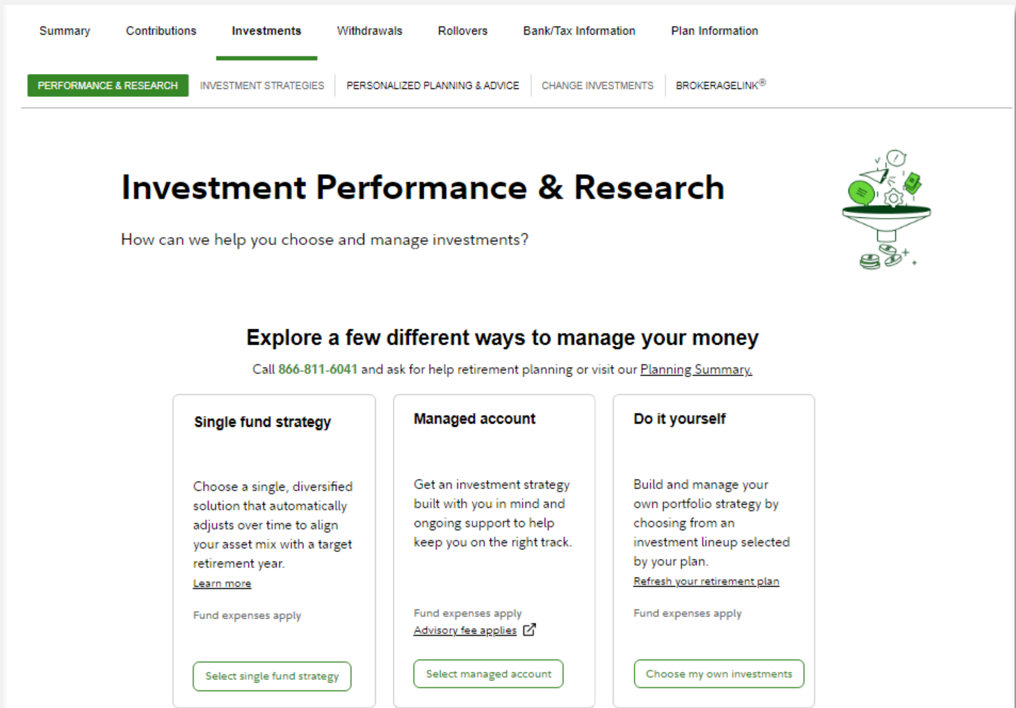
Change Investments Page



Personalized Planning & Advice Eligible Landing Page



Investment Performance & Research Page



Appointment Scheduler

Important Information

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For plan sponsor use 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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