Investment Help and Fidelity® Personalized Planning & Advice (PP&A) Communications & Education

Providing strategies and resources to help employees feel confident in managing their retirement

Investment Help
Awareness and Adoption

COMMUNICATIONS

Investment Help Campaign (Fidelity-deployed)

- Multi-touch email that offers investment strategies and a pricing incentive. Campaign can be deployed as needed

Off-the-shelf content:

- Emails
- Digital signage
- Social/Newsletter/Intranet Copy
- Planning & Guidance Center Flyer

CONTENT AVAILABLE ON NETBENEFITS®

- Learn Hub: Collection of resources with relevant and current topics

FIDELITY WORKSHOPS

Onsite Live, On Demand and Virtual Live

Topic: Take the First Step to Investing

- Review the basics of investing and understand asset allocation/diversification

Topic: Make the Most of Your Retirement Savings

- See the importance of saving as much as possible and learn the benefits of saving more

Ask Fidelity (Onsite Live and Virtual Live)

Short presentation, demo of NetBenefits and Q&A

Topic: Investment Styles

- Finding an investment style to fit your needs

CLICK HERE TO VIEW SAMPLES

PP&A
Awareness and Adoption

COMMUNICATIONS

Activation Campaign (Fidelity-deployed)

- Multi-touch email that creates awareness and offers a pricing incentive to sign up for PP&A. Campaign can be deployed as needed

Re-engagement Campaign (Triggered)

- Multi-touch email that is targeted to re-engage and reinforce the value of PP&A

PP&A Campaign (Fidelity-deployed)

- Multi-touch email that creates awareness for PP&A and offers a pricing incentive. Campaign can be deployed as needed

Off-the-shelf content:

- Emails
- Digital signage
- Social/Newsletter/Intranet Copy
- Brochure
- Videos
- FAQ

FIDELITY WORKSHOPS

Onsite Live, On Demand and Virtual Live

Topic: Fidelity® Personalized Planning & Advice

- Learn to manage your own portfolio and explore Fidelity's professional investment management

Topic: Invest Confidently for Your Future

- Define your savings goals and build an investment plan to help you optimize your savings

Ask Fidelity (Onsite Live and Virtual Live)

Short presentation, demo of NetBenefits and Q&A

Topic: Getting the Most From Personalized Planning & Advice

- Understanding the features and benefits of the service

Additional resources available on:
NetBenefits - Dashboard, Learn Hub, Main Navigation pages (DC Summary, Investment Performance & Research, Change Investments, Investment Strategies), Profile Video page, Market Perspective content, PP&A Eligible Landing Page, Homepage banner **Mobile app** – DC Summary card, In-App Pop-ups

Enrolled
Onboarding and Engagement

ONBOARDING (FIRST 90 DAYS)

Enrollment Campaign (Fidelity-deployed)

- Multi-touch email with print backup that sets expectations and provides clear actions for participants to consider

Content available on NetBenefits

- Dashboard
- Homepage banner, Action card

ONGOING

Quarterly Check-in/Annual Check-up Campaign (Fidelity-deployed)

- Multi-touch email with print backup that provides status update and action steps
- NetBenefits Homepage banner

Profile Reminder Campaign-2 *times per year* (Fidelity-deployed)

- Email with print backup that only targets those who have yet to update their Profile
- Dashboard
- NetBenefits Homepage banner, mobile app notification

INVESTMENT REVIEWS

Investment Strategy

- Strategy updates and changes for every enrolled plan, 3-4+ times per year after every rescore or Profile update

Trade Confirmation

- Notifies of trades in account after rescore or Profile update

Annual Letter (10.5 month)

- Encourages Profile update. Sent 10.5 months after the last Profile update

RETIREMENT

Retirement Readiness

- Multi-touch email is sent 5 years from retirement age, 1 year from retirement age and at retirement age

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