

Subject: Midyear money review

Preheader: FidBits: Tools to help you stay well financially.



[Firstname] [Lastname]

[Secure login](#)

FidBits

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

Give your goals a midyear check-in

The middle of the year is a great time to review your spending, saving, and progress toward goals. Your financial wellness dashboard has money tips and planning tools to help.

[Check your progress](#)



Saving today for a brighter tomorrow

Take a moment to review your [retirement plan contributions](#). Fidelity generally recommends saving 15% of your pre-tax income for retirement, including employer contributions. Even a 1% increase in what you save can make a real difference over time.



You deserve a vacation—plan for it

Ready to check your schedule and make a plan? [These tips](#) can help you turn your travel goals into savings goals without derailing the rest of your finances.

Check up to level up

Your [financial wellness action plan](#)—tailored to your unique situation and goals—awaits. If you haven't already, take the Financial Wellness Checkup, or visit your action plan to make progress on the next task.

Your action plan can help you feel more confident about your **spending, saving, debt management, and financial protection.**



How to begin investing for retirement

This on-demand, 1-hour webinar covers investing fundamentals, asset classes, and strategies for making the most of your [workplace savings](#).



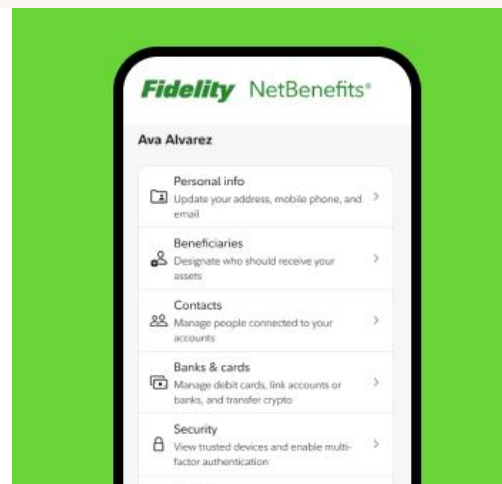
Starting a new job? Make these money moves

New role, new opportunities. These [4 steps](#) can help you focus on your financial transition, use your benefits wisely, and avoid leaving money on the table.

Review your NetBenefits profile

Confirm your contact info, security preferences, and beneficiaries—it's a small step that helps keep your plan on course.

[Log in](#)



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



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.

1261485.1.0