Communications to engage and educate employees

2027 at a glance*

January–March

January

- FidBits newsletter
- Financial Wellness Month
- Executive Services EY tax campaign

February

- FidBits newsletter
- Investment mix alignment
- Fidelity Health Savings Account (HSA) prior-year contributions
- Stock Plan Services (SPS) tax campaign

March

- Quarterly check-in
- Women's History Month
- Tax-Exempt Market (TEM): Higher education spring campaign
- Student Debt Retirement (SDR) awareness
- Student Debt Direct (SDD) awareness
- SPS quarterly account maintenance

April–June

April

- FidBits newsletter
- HSA investing

May

- FidBits newsletter
- TEM: Healthcare month

June

- Quarterly check-In
- Goal Booster awareness
- Annual Enrollment (HSA and Health & welfare)
- HSA contributions
- SPS quarterly account maintenance

July–September

July

- FidBits newsletter
- TEM: Engaging the unengaged

August

- FidBits newsletter
- Investment mix alignment

September

- Quarterly check-in
- SPS quarterly account maintenance

October–December

October

- FidBits newsletter
- Investment strategies
- Women Talk Money
- HSA onboarding
- HSA investing
- SPS W8-BEN

November

- FidBits newsletter
- Fidelity Personalized Planning & Advice year in review
- TEM: financial basics

December

- Quarterly check-in
- Giving season
- HSA end-of-year reminder
- SPS quarterly account maintenance

Triggered and responsive campaigns:

Activated based on participant age, behavior, or plan event triggers.

Review our existing communication journeys anytime in the C&E Resource Center. For the SPS C&E journey, explore the SPS participant email C&E journey.

Continuous programs focused on moments that matter: Enrollment, onboarding, financial wellness series, tenured unenrolled, workplace loans series, recently separated series, transition to retirement series, HSA journeys (approaching age 26, onboarding, reminder to open, employer contributions, approaching IRS limit, enrolling in Medicare), SDD and SDR invite and abandoners, SDR annual review, Goal Booster – ongoing awareness for employees who haven't yet created a goal, eDelivery, etc.

Includes NetBenefits® homepage, library content and banners, seasonal infographics, digital signage, SMS messaging, and social content. Visit PSW® for more details.

Plan-specific engagement:

Additional campaigns targeted to your goals, plan changes, and new product rollout.

Plan and event-based	Plan and event-based	Plan and event-based	Plan and event-based
• TBD	• TBD	• TBD	• TBD

* Subject to change.

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