PP&A Activation: Sponsor Newsletter, Social Post, or Intranet Copy

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Pre-Launch

Note: "Learn more here" would link to the Click-Thru content on page 3. If the client does not want to use the Click-Thru content, they are welcome to use only the phone number phrase. Note: PP&A page on NetBenefits® will not be available yet.

Option 1: Coming soon: **<Sponsor name>** is adding a new managed account to your benefits package. Be on the lookout for Fidelity® Personalized Planning & Advice, a customized investment strategy that takes into account your unique financial situation.

<Learn more here.><To learn more, speak with a licensed Fidelity representative at 800-811-6041.>

Option 2: Good news! **<Sponsor name>** will soon offer Personalized Planning & Advice from Fidelity® as part of your benefits package! Be on the lookout for this investment strategy that helps keep you on the right track for retirement.

<Learn more here.><To learn more, speak with a licensed Fidelity representative at 800-811-6041.>

Option 3: Did you hear the news? **<Sponsor name>'s** benefits package will soon offer Personalized Planning & Advice from Fidelity®. Keep an eye out for this investment strategy that helps keep you on the right track for retirement.

<Learn more here.><To learn more, speak with a licensed Fidelity representative at 800-811-6041.>

Option 4: A new managed account option will soon be added to your benefits package at **<Sponsor name>**. Be on the lookout for Fidelity® Personalized Planning & Advice, an investment strategy that takes into account your unique financial situation.

<Learn more here.><To learn more, speak with a licensed Fidelity representative at 800-811-6041.>

Investing involves risk, including risk of loss.

Fidelity® Personalized Planning & Advice *at Work* is a service of Fidelity Personal and Workplace Advisors LLC and Strategic Advisers LLC. Both are registered investment advisers and Fidelity Investments companies and may be referred to as "Fidelity," "we," or "our" within. For more information, refer to the Terms and Conditions of the Program. When used herein, Fidelity Personalized Planning & Advice refers exclusively to Fidelity Personalized Planning & Advice *at Work*. **This service provides advisory services for a fee.**

You may unenroll by calling a representative. There are no cancellation fees.

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Post-Launch

Note: "Here" would link to the optional Click-Thru content on page 3.

Option 1: Congratulations! Your benefits package now offers Personalized Planning & Advice from Fidelity®, a managed account that helps keep you on the right track for retirement.

Learn more <on NetBenefits®><here>< or speak with a licensed Fidelity representative at 800-811-6041>.

<Save <X%> on the advisory fee for your first <NUMBER> days when you start a managed account by <DATE.>

Option 2: Did you hear the news? Your benefits package now offers Personalized Planning & Advice from Fidelity®, an investment strategy that helps keep you on the right track for retirement.

Learn more about this managed account option <on NetBenefits®><here>< or speak with a licensed Fidelity representative at 800-811-6041>.

<Save <X%> on the advisory fee for your first <NUMBER> days when you start a managed account by <DATE.>

Option 3: Good news! Your benefits package now offers Personalized Planning & Advice from Fidelity®, an investment strategy that helps keep you on the right track for retirement.

Learn more <on NetBenefits®><here><or speak with a licensed Fidelity representative at 800-811-6041>.

<Save <X%> on the advisory fee for your first <NUMBER> days when you start a managed account by <DATE.>

Option 4: You have a new benefits offer!

Get on target for retirement with Fidelity® Personalized Planning & Advice.

Learn more <on NetBenefits®><here>< or call 800-811-6041>.

<Save <X%> on the advisory fee for your first <NUMBER> days when you start a managed account by <DATE.>

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Supporting "Click-Thru" Content (Optional)

Note: Only include <or via the NetBenefits® website> if PP&A has launched. "FAQ" content can be found under eReview #1083822.

Fidelity® Personalized Planning & Advice is an investment plan designed by Fidelity to help you save for retirement.

Personalized Planning & Advice takes into account **your unique financial situation** and creates a personalized investment strategy that helps **keep you on the right track for retirement**.

With a professionally managed workplace savings account you'll receive quarterly updates on your investment allocations while we monitor and adjust them through market ups and downs.

You'll have access to an exclusive dashboard to:

- Track income estimates.
- Track your progress towards retirement.
- Make updates based on life events.

<**<Sponsor name>** has negotiated an exclusive advisory fee on your behalf that makes this service more affordable.>

Learn more by speaking with a licensed representative at 800-811-6041 <or via the NetBenefits® website>.

<Have more questions? Check out our FAQ!>

Investing involves risk, including risk of loss.

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