

Community Insight Modules

Financial education and insight that reflects the goals and priorities of diverse communities



At Fidelity, we understand that there's no one-size-fits-all approach to financial wellness. Everyone's financial wellness journey is as unique as their fingerprint.

While everyone's journey is different, cultural and community-specific factors impact financial decision-making. Community insight modules contextualize the various goals, priorities, and challenges diverse communities face and provide relevant, action-oriented steps employees can take to build their financial wellness.



What are diverse communities?

Diverse communities are groups of individuals or populations that vary in their social, economic, cultural, and demographic characteristics, and may be united by shared experiences, goals, or values.



What are community insight modules?

These insight-driven content modules, focused on diverse communities, are designed to complement Fidelity's existing workshops and to engage diverse communities by highlighting the cultural and/or community-specific factors that impact their financial decisions.



Did you know?



Black, Latino/a/x, and Asian employees are more likely to have provided financial support to extended family over the past year than their white peers.¹



Life expectancy for women is 5.7 years longer than for men, resulting in higher health care costs.²



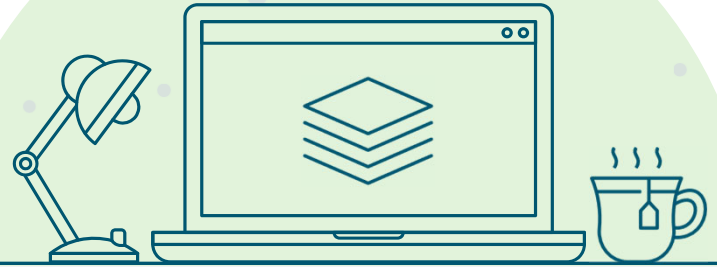
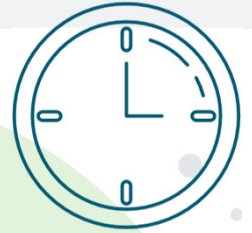
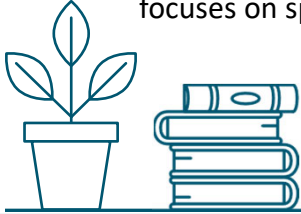
According to the Financial Health Network, in 2021, LGBTQ+ people were 31% more likely to be financially vulnerable and 20% less likely to be financially healthy than non-LGBTQ+ people.³

These modules are tailored to each community. The content is designed to integrate with Fidelity's existing suite of workshops. Community insight modules set the stage for a rich discussion on relevant suggested next steps to take and targeted resources diverse employees can use to help improve their financial well-being.



How should community insight modules be used?

These modules were created to be delivered by approved Fidelity representatives and are intended to complement Employee Resource Group (ERG) engagements as the content focuses on specific communities.



What community insight modules are available?

Modules are currently available for the following communities:

Black



Latino/a/x



Asian American & Pacific Islander



Women



Next Gen



LGBTQ+



Military



How can I coordinate a workshop with a community insight module?

Contact your account team to coordinate a workshop and indicate your interest in incorporating a community insight module.



¹ Fidelity Investments 2020 Financial Experiences Research online survey of 591 FMR LLC employees.

² Fidelity Investments® 2021 Women and Investing Study, August 2021.

³ Financial Health Network, "Queer Financial Health: Checking the Pulse During the Pandemic," July 2021. <https://finhealthnetwork.org/queer-financial-healthchecking-the-pulse-during-the-pandemic/>.

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Keep in mind that investing involves risk. The value of your investment will fluctuate over time, and you may gain or lose money.

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