Investment Help/Personalized Planning & Advice Awareness Campaign

Fidelity INVESTMENTS

Campaign Overview

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Our goal
Drive awareness and consideration about Fidelity® Personalized Planning & Advice

When
Starting the week of June 3, 2025.

Pricing incentive
Enroll by June 27, 2025, and we will waive the advisory fee for the first 90 days.

Who's included
All active participants (with a balance) and term participants (with balances over $5,000) in plans that offer Fidelity's managed account service and are eligible for campaign.

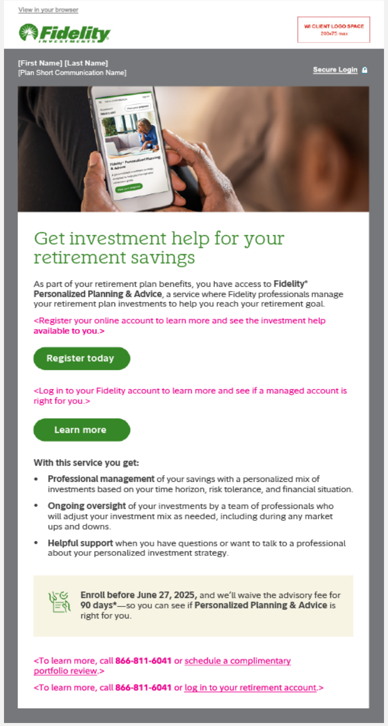
How we'll communicate
This multi-channel campaign includes e-mail, and NetBenefits® messaging, and mobile in-app notification.

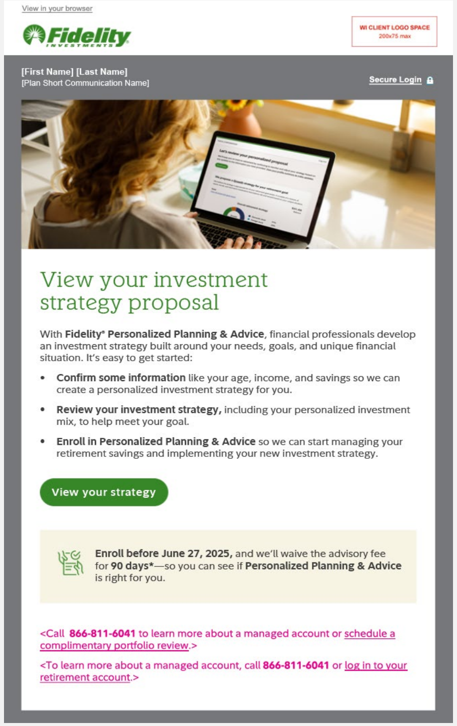
Campaign Cadence

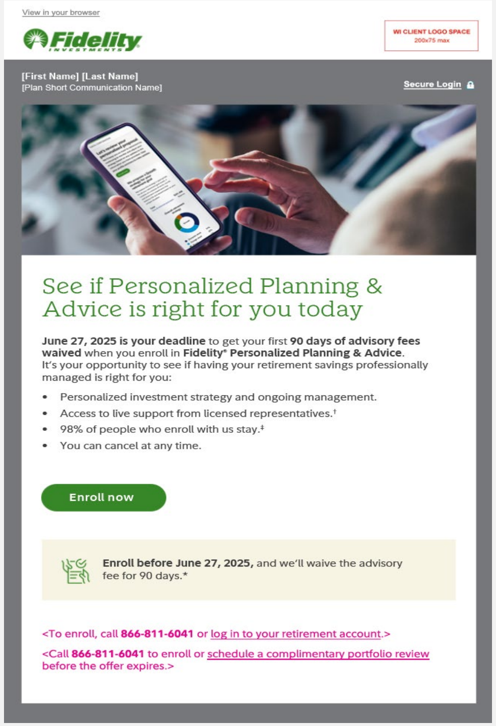
Campaign Cadence

A multi-channel communications program that includes up to three e-mails, and NetBenefits® integrated messaging.

E-mail Touch 1	E-mail Touch 2	E-mail Touch 3
PP&A awareness	PP&A consideration	Reminder
Sent week of June 3, 2025	*Sent week of June 17, 2025*	*Sent week of June 24, 2025*







Screenshots, content, and graphics are for illustrative purposes only

Email Sample and Links

E-mail Sample Touch 1

PP&A awareness

Links and calls to action:

- **Personalized Planning & Advice eligible landing page**
- **Participants can schedule a complementary portfolio review if they have $100,000 or more in assets**

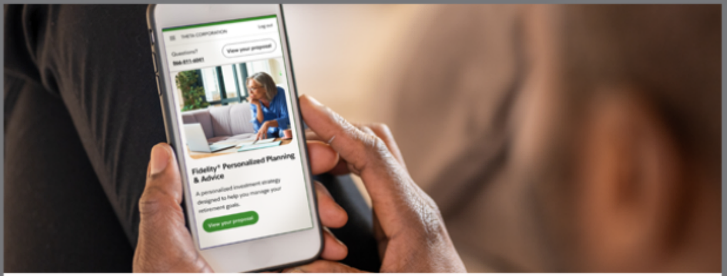
View in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

[First Name] [Last Name]
[Plan Short Communication Name]

Secure Login



Get investment help for your retirement savings

As part of your retirement plan benefits, you have access to **Fidelity® Personalized Planning & Advice**, a service where Fidelity professionals manage your retirement plan investments to help you reach your retirement goal.

Learn more

With this service you get:

- **Professional management** of your savings with a personalized mix of investments based on your time horizon, risk tolerance, and financial situation.
- **Ongoing oversight** of your investments by a team of professionals who will adjust your investment mix as needed, including during any market ups and downs.
- **Helpful support** when you have questions or want to talk to a professional about your personalized investment strategy.

Enroll before June 27, 2025, and we'll waive the advisory fee for **90 days***—so you can see if **Personalized Planning & Advice** is right for you.

<To learn more, call **866-811-6041** or schedule a complimentary portfolio review.>

<To learn more, call **866-811-6041** or log in to your retirement account.>

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E-mail Sample
Touch 2
PP&A consideration

Links and calls to action:

- **Personalized Planning & Advice eligible landing page**
- **Participants can schedule a complementary portfolio review if they have $100,000 or more in assets**

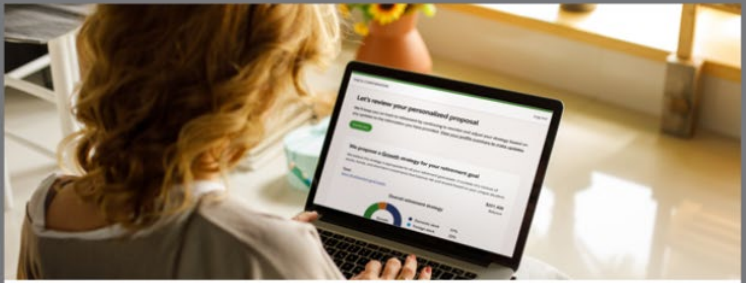
View in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

[First Name] [Last Name]
[Plan Short Communication Name]

Secure Login



View your investment strategy proposal

With **Fidelity® Personalized Planning & Advice**, financial professionals develop an investment strategy built around your needs, goals, and unique financial situation. It's easy to get started:

- **Confirm some information** like your age, income, and savings so we can create a personalized investment strategy for you.
- **Review your investment strategy,** including your personalized investment mix, to help meet your goal.
- **Enroll in Personalized Planning & Advice** so we can start managing your retirement savings and implementing your new investment strategy.

View your strategy

Enroll before June 27, 2025, and we'll waive the advisory fee for **90 days***—so you can see if **Personalized Planning & Advice** is right for you.

<Call **866-811-6041** to learn more about a managed account or schedule a complimentary portfolio review.>

<To learn more about a managed account, call **866-811-6041** or log in to your retirement account.>

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E-mail Sample
Touch 3
Reminder

Links and calls to action:

- **Personalized Planning & Advice eligible landing page** (orange)
- **Participants can schedule a complementary portfolio review if they have $100,000 or more in assets** (blue)

View in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

[First Name] [Last Name]
[Plan Short Communication Name]

Secure Login

See if Personalized Planning & Advice is right for you today

June 27, 2025 is your deadline to get your first **90 days of advisory fees waived** when you enroll in **Fidelity® Personalized Planning & Advice**.
It's your opportunity to see if having your retirement savings professionally managed is right for you:

- Personalized investment strategy and ongoing management.
- Access to live support from licensed representatives.†
- 98% of people who enroll with us stay.‡
- You can cancel at any time.

Enroll now

Enroll before June 27, 2025, and we'll waive the advisory fee for 90 days.*

<To enroll, call **866-811-6041** or log in to your retirement account.>

<Call **866-811-6041** to enroll or schedule a complimentary portfolio review before the offer expires.>

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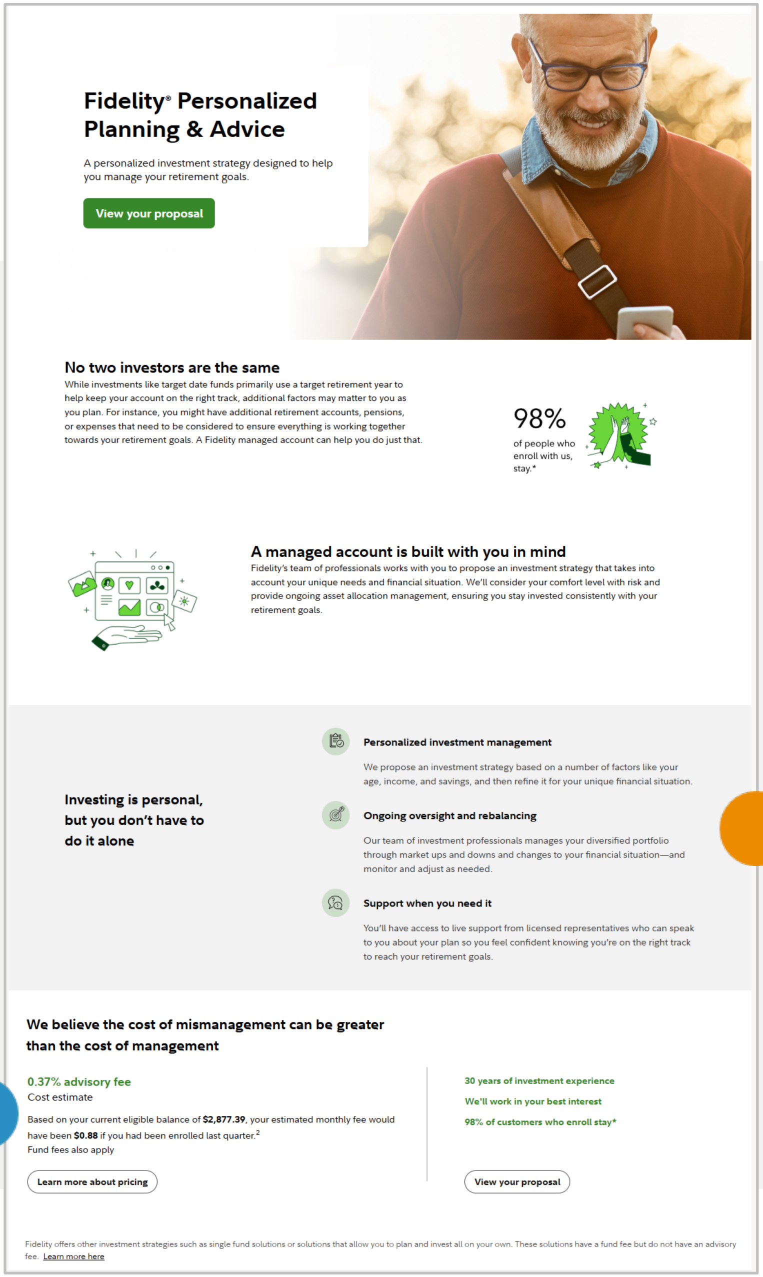
Destination webpages

Personalized Planning & Advice Eligible Landing Page

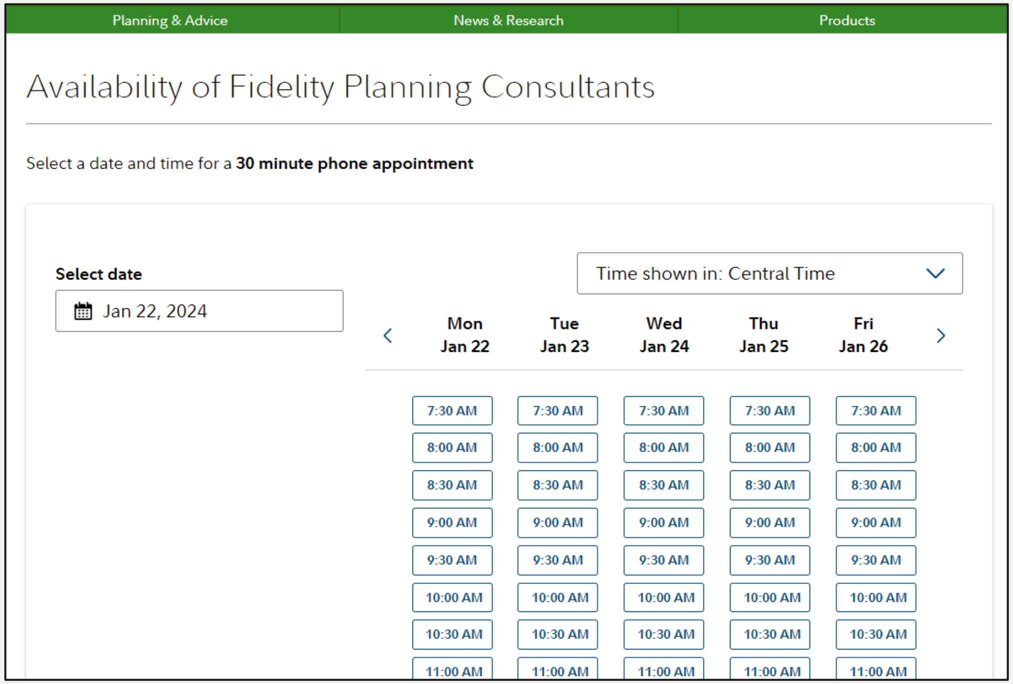
- The eligible landing page highlights key features and benefits.
- Estimates monthly fee based on current eligible balance.

Eligible landing page will integrate campaign messaging.



Appointment Scheduler

Participants can schedule a complementary portfolio review if they have $100,000 or more in assets



Important Information

Investing involves risk, including risk of loss.

For plan sponsor use only.

Screenshots and graphics are hypothetical and for illustrative purposes only.

Fidelity® Personalized Planning & Advice at Work is a service of Strategic Advisers LLC, a registered investment adviser and a Fidelity Investments company, 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.**

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