

Investment Help/Personalized Planning & Advice Awareness Campaign



Campaign Overview

Campaign Overview

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

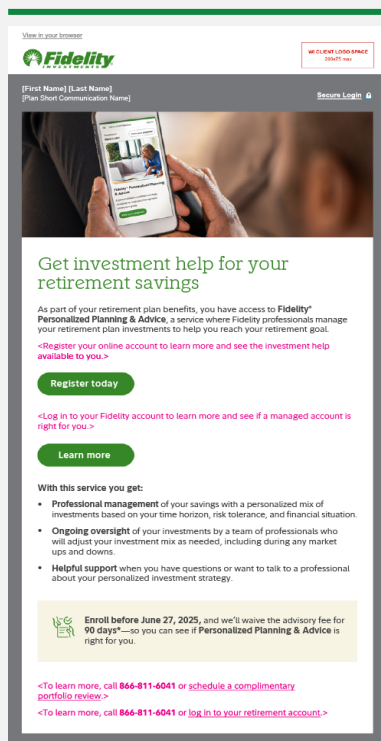
This multi-channel campaign includes e-mail, and NetBenefits® messaging, and mobile in-app notification.

Campaign Cadence

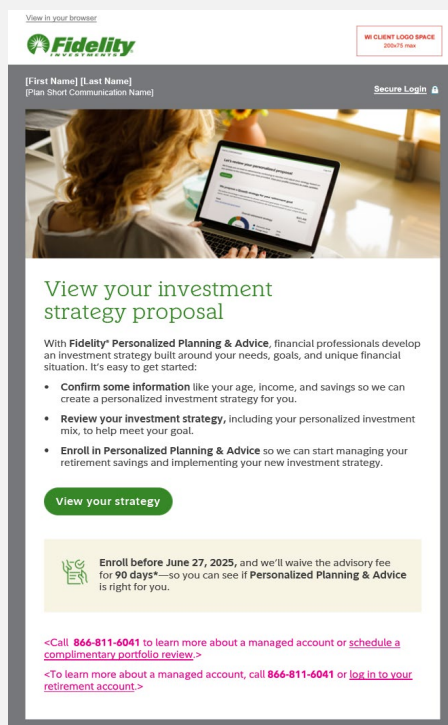
Campaign Cadence

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

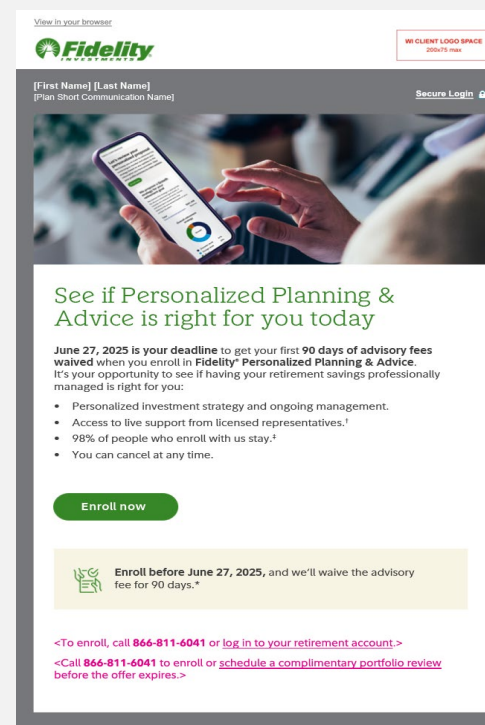
E-mail Touch 1
PP&A awareness
Sent week of June 3, 2025



E-mail Touch 2
PP&A consideration
Sent week of June 17, 2025



E-mail Touch 3
Reminder
Sent week of June 24, 2025



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**

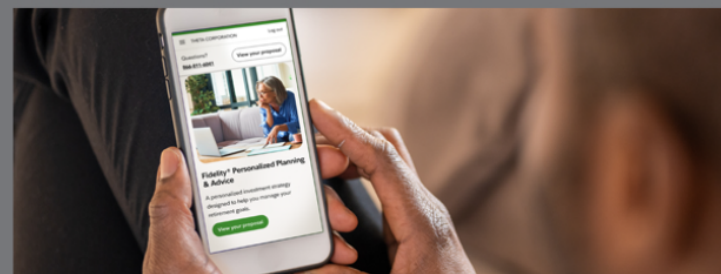
[View in your browser](#)



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](#).>

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](#)



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](#).>

E-mail Sample

Touch 3

Reminder

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](#) 





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.>

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.

Fidelity® Personalized Planning & Advice


A personalized investment strategy designed to help you manage your retirement goals.


[View your proposal](#)



No two investors are the same

While investments like target date funds primarily use a target retirement year to help keep your account on the right track, additional factors may matter to you as you plan. For instance, you might have additional retirement accounts, pensions, or expenses that need to be considered to ensure everything is working together towards your retirement goals. A Fidelity managed account can help you do just that.


98% of people who enroll with us, stay* 





A managed account is built with you in mind

Fidelity's team of professionals works with you to propose an investment strategy that takes into account your unique needs and financial situation. We'll consider your comfort level with risk and provide ongoing asset allocation management, ensuring you stay invested consistently with your retirement goals.

Investing is personal, but you don't have to do it alone

- **Personalized investment management**

We propose an investment strategy based on a number of factors like your age, income, and savings, and then refine it for your unique financial situation.
- **Ongoing oversight and rebalancing**

Our team of investment professionals manages your diversified portfolio through market ups and downs and changes to your financial situation—and monitor and adjust as needed.
- **Support when you need it**

You'll have access to live support from licensed representatives who can speak to you about your plan so you feel confident knowing you're on the right track to reach your retirement goals.

We believe the cost of mismanagement can be greater than the cost of management

0.37% advisory fee
Cost estimate

Based on your current eligible balance of **\$2,877.39**, your estimated monthly fee would have been **\$0.88** if you had been enrolled last quarter.²
Fund fees also apply

[Learn more about pricing](#)

30 years of investment experience
We'll work in your best interest
98% of customers who enroll stay*

[View your proposal](#)

Fidelity offers other investment strategies such as single fund solutions or solutions that allow you to plan and invest all on your own. These solutions have a fund fee but do not have an advisory fee. [Learn more here](#)

Appointment Scheduler

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

Planning & Advice

News & Research

Products

Availability of Fidelity Planning Consultants

Select a date and time for a **30 minute phone appointment**

Select date

 Jan 22, 2024

Time shown in: Central Time

▼

<

Mon
Jan 22

Tue
Jan 23

Wed
Jan 24

Thu
Jan 25

Fri
Jan 26

>

7:30 AM	7:30 AM	7:30 AM	7:30 AM	7:30 AM
8:00 AM	8:00 AM	8:00 AM	8:00 AM	8:00 AM
8:30 AM	8:30 AM	8:30 AM	8:30 AM	8:30 AM
9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM
9:30 AM	9:30 AM	9:30 AM	9:30 AM	9:30 AM
10:00 AM	10:00 AM	10:00 AM	10:00 AM	10:00 AM
10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM
11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM

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.**

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

©2025 FMR LLC. All rights reserved.

1202936.1.0