

# Investment Help and Fidelity® Personalized Planning & Advice (PP&A) Communications & Education

Providing strategies and resources to help employees feel confident in managing their retirement

## Investment Help Awareness and Adoption

### COMMUNICATIONS

#### Investment Help Campaign (Fidelity-deployed)

- Multi-touch email that offers investment strategies and a pricing incentive. Campaign can be deployed as needed

#### Off-the-shelf content:

- Emails
- Digital signage
- Social/Newsletter/Intranet Copy
- Planning & Guidance Center Flyer

### CONTENT AVAILABLE ON NETBENEFITS®

- Learn Hub: Collection of resources with relevant and current topics

### FIDELITY WORKSHOPS

#### Onsite Live, On Demand and Virtual Live

- ▶ **Topic: Take the First Step to Investing**
  - Review the basics of investing and understand asset allocation/diversification
- ▶ **Topic: Make the Most of Your Retirement Savings**
  - See the importance of saving as much as possible and learn the benefits of saving more

#### Ask Fidelity (Onsite Live and Virtual Live)

*Short presentation, demo of NetBenefits and Q&A*

- ▶ **Topic: Investment Styles**
  - Finding an investment style to fit your needs

## PP&A Awareness and Adoption

### COMMUNICATIONS

#### Activation Campaign (Fidelity-deployed)

- Multi-touch email that creates awareness and offers a pricing incentive to sign up for PP&A. Campaign can be deployed as needed

#### Re-engagement Campaign (Triggered)

- Multi-touch email that is targeted to re-engage and reinforce the value of PP&A

#### PP&A Campaign (Fidelity-deployed)

- Multi-touch email that creates awareness for PP&A and offers a pricing incentive. Campaign can be deployed as needed

#### Off-the-shelf content:

- Emails
- Digital signage
- Social/Newsletter/Intranet Copy
- Brochure
- Videos
- FAQ

### FIDELITY WORKSHOPS

#### Onsite Live, On Demand and Virtual Live

- ▶ **Topic: Fidelity® Personalized Planning & Advice**
  - Learn to manage your own portfolio and explore Fidelity's professional investment management
- ▶ **Topic: Invest Confidently for Your Future**
  - Define your savings goals and build an investment plan to help you optimize your savings
- ▶ **Topic: Getting the Most From Personalized Planning & Advice**
  - Understanding the features and benefits of the service

#### Additional resources available on:

**NetBenefits** - Dashboard, Learn Hub, Main Navigation pages (DC Summary, Investment Performance & Research, Change Investments, Investment Strategies), Profile Video page, Market Perspective content, PP&A Eligible Landing Page, Homepage banner **Mobile app** - DC Summary card, In-App Pop-ups

## Enrolled Onboarding and Engagement

### ONBOARDING (FIRST 90 DAYS)

#### Enrollment Campaign (Fidelity-deployed)

- Multi-touch email with print backup that sets expectations and provides clear actions for participants to consider

#### Content available on NetBenefits

- Dashboard
- Homepage banner, Action card

### ONGOING

#### Quarterly Check-in/Annual Check-up Campaign (Fidelity-deployed)

- Multi-touch email with print backup that provides status update and action steps
- NetBenefits Homepage banner

#### Profile Reminder Campaign-2 times per year (Fidelity-deployed)

- Email with print backup that only targets those who have yet to update their Profile
- Dashboard
- NetBenefits Homepage banner, mobile app notification

### INVESTMENT REVIEWS

#### Investment Strategy

- Strategy updates and changes for every enrolled plan, 3-4+ times per year after every rescore or Profile update

#### Trade Confirmation

- Notices of trades in account after rescore or Profile update

#### Annual Letter (10.5 month)

- Encourages Profile update. Sent 10.5 months after the last Profile update

### RETIREMENT

#### Retirement Readiness

- Multi-touch email is sent 5 years from retirement age, 1 year from retirement age and at retirement age



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SAMPLES](#)

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