



# Fidelity® Personalized Planning & Advice

Awareness Campaign



# Personalized Planning & Advice

Awareness  
campaign

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# PP&A Awareness Campaign: Overview

Annual awareness campaign that drives participant engagement and awareness of managed account plan feature.

Educates participants on what a managed account is and helps them consider if could be right for them.



**Personalized  
Planning &  
Advice users:**

**93%** stay actively engaged in planning for retirement<sup>1</sup>

**2X** as likely to be highly engaged with planning (vs. those not enrolled)<sup>2</sup>

**~90%** feel confident in their financial security - up from 54%<sup>3</sup>

<sup>1</sup> Fidelity analysis as of June 30, 2024. Engagement is measured for both active and terminated enrolled participants in corporate DC and TEM plans with a positive balance over a period of the last 12 months. "Engaged" includes three tiers: Highly Engaged, Educational Engaged, and Basic-Level Engaged and is defined as follows:

- Basic Engaged: NetBenefits® or Fidelity.com log-in; inbound phone call
- Education Engaged: NetBenefits content views/engagement; advisory dashboard visit; financial wellness topic pages view; live events visit; Learn Hub visits; Student Debt Tool visit
- Highly Engaged: Self-led or rep-led tool completion; phone guidance; onsite one-on-one meetings; Fidelity branch visits; workshop attendance; financial wellness assessment completion; IPQ update; journey space interactions; Goal Booster usage

<sup>2</sup> Fidelity analysis as of June 30, 2025. Engagement is measured for both active and terminated enrolled participants in corporate DC and TEM plans with a positive balance over a period of the last 12 months. "Engaged" includes three tiers: Highly Engaged, Educational Engaged, and Basic-Level Engaged. ~50% of participants in the service are highly engaged vs. ~18% of those not enrolled.

<sup>3</sup> Confidence measured by questions answered in the service's Personal Profile from point of enrollment to the current state, as of September 30, 2024. Respondent who answered "somewhat secure" and "secure" were included in the percentages cited. Participants enrolled in the service for less than one year as of September 30, 2024 were excluded from the analysis.

# PP&A Awareness Campaign: Timeline

Driving participant engagement and awareness of managed account plan feature

Week of **June 8**

Week of **June 15**

Week of **June 22**

Educate

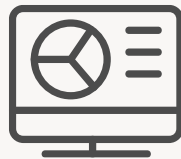
Explain

Remind

Email outreach



NetBenefits integrated messaging



NetBenefits homepage



PP&A overview



DC Summary

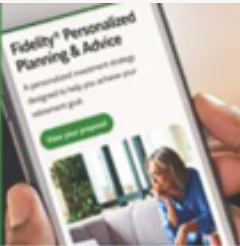


Investment Strategies

# PP&A Awareness Campaign: E-mail samples

## Educate

- Includes overview on what a managed account is and key features for consideration.



Get investment advice for your retirement savings


With your retirement plan benefits, you have access to ongoing investment management through **Fidelity® Personalized Planning & Advice**. Let Fidelity professionals put their experience to work managing a diversified, durable, and personalized investment strategy that's designed to weather various market conditions.

Log in to your Fidelity account to see your personalized investment strategy.

[Get started](#)

Gain confidence in your retirement and get the following:

- **Professional management** of your savings that considers your unique needs, comfort with risk, and your financial accounts—even the ones we don't manage.
- **Ongoing oversight** by a team of professionals who will rebalance your investment mix as needed.
- **Helpful support** when you want to talk with a professional about your retirement goal.

 **Get started before June 26** and we'll waive the advisory fees for **90 days**<sup>1</sup>—so you can see whether Fidelity® Personalized Planning & Advice is right for you.

**We're here to help**

Call **866-811-6041** to talk one-on-one with a Fidelity planning professional at no cost to you. You can also [schedule a complimentary portfolio review](#)—and select a date and time that is convenient for you.



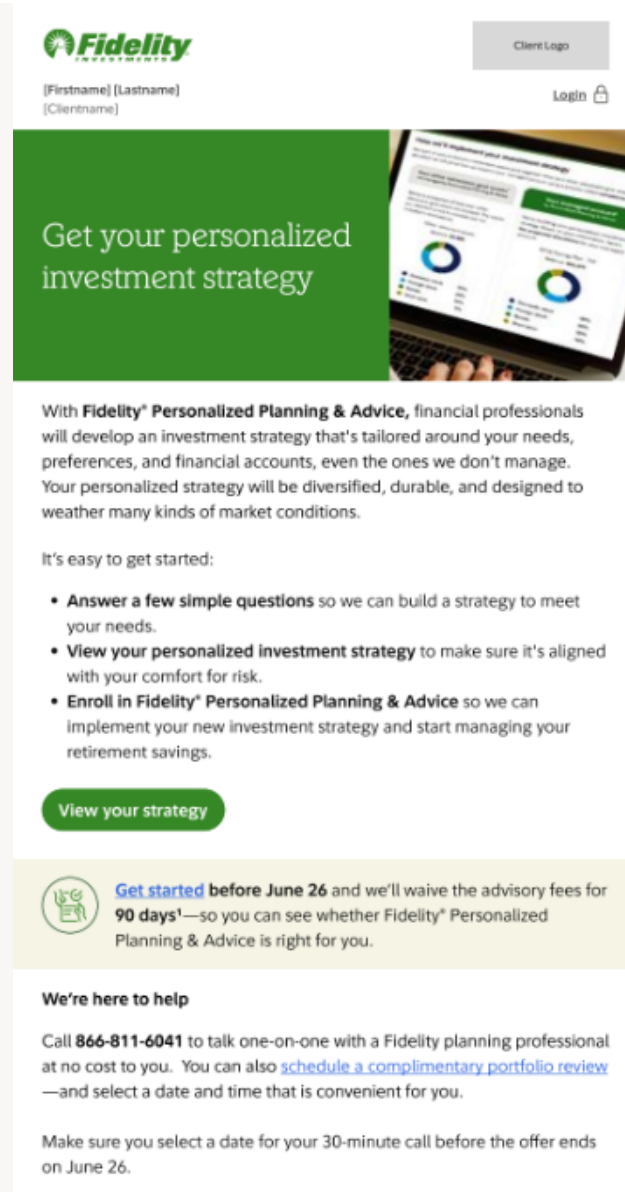
The **NetBenefits®** app gives you more ways to access and manage your employee benefits. Download or [open the app](#).



# PP&A Awareness Campaign: E-mail samples

## Explain

- Guides participants on how to view their personalized investment strategy proposal to help them consider if a managed account is right for them.



The screenshot shows an email header with the Fidelity logo, a "Client Logo" placeholder, and fields for "[Firstname] [Lastname]" and "[Clientname]". A "Login" button with a lock icon is also present. The main content area features a green banner with the text "Get your personalized investment strategy" and an image of a laptop displaying a dashboard with charts. Below the banner, a paragraph explains that Fidelity's Personalized Planning & Advice service develops tailored investment strategies based on individual needs and preferences. A section titled "It's easy to get started:" lists three steps: answering simple questions, viewing the personalized strategy, and enrolling in the service. A green button labeled "View your strategy" is positioned below the list. A yellow callout box with a calendar icon states that advisory fees will be waived for 90 days if the user gets started before June 26. The email concludes with a "We're here to help" section, providing a phone number (866-811-6041) and a link to schedule a complimentary portfolio review, along with a note that the offer ends on June 26.

**Fidelity**  
[Firstname] [Lastname]  
[Clientname]

Client Logo  
Login


### Get your personalized investment strategy

With **Fidelity® Personalized Planning & Advice**, financial professionals will develop an investment strategy that's tailored around your needs, preferences, and financial accounts, even the ones we don't manage. Your personalized strategy will be diversified, durable, and designed to weather many kinds of market conditions.

It's easy to get started:

- **Answer a few simple questions** so we can build a strategy to meet your needs.
- **View your personalized investment strategy** to make sure it's aligned with your comfort for risk.
- **Enroll in Fidelity® Personalized Planning & Advice** so we can implement your new investment strategy and start managing your retirement savings.

[View your strategy](#)

 **Get started before June 26** and we'll waive the advisory fees for **90 days**<sup>1</sup>—so you can see whether Fidelity® Personalized Planning & Advice is right for you.

**We're here to help**


Call **866-811-6041** to talk one-on-one with a Fidelity planning professional at no cost to you. You can also [schedule a complimentary portfolio review](#)—and select a date and time that is convenient for you.

Make sure you select a date for your 30-minute call before the offer ends on June 26.

# PP&A Awareness Campaign: E-mail samples


## Remind

- Reminds participants of the enrollment deadline to get first 90 days of advisory fees waived.

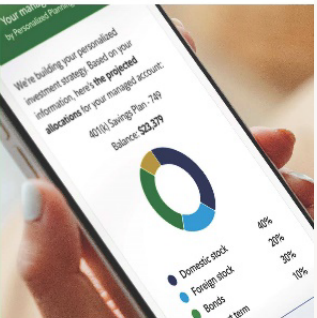


[Firstname] [Lastname]  
[Clientname]

Client Logo

Login 


### Try Fidelity® Personalized Planning & Advice



This offer ends **June 26**. Get your first **90 days<sup>1</sup> of advisory fees waived** when you enroll in **Fidelity® Personalized Planning & Advice**. It's your opportunity to see whether having your retirement savings professionally managed is right for you:

- Get a personalized investment strategy and ongoing management.
- Access to live support from licensed representatives.<sup>2</sup>
- 98% of people who enroll with us stay.<sup>3</sup>
- You can cancel at any time.

[Enroll now](#)

 **Enroll before June 26** and we'll waive the advisory fees for **90 days**.

To enroll, call **866-811-6041** to talk one-on-one with a Fidelity planning professional at no cost to you.

# PP&A Awareness Campaign: E-mail destinations

## Landing page

- Includes overview on what a managed account is and key features for consideration.
- Includes estimate of professional management monthly fee based on managed account eligible balance.

The screenshot shows the Fidelity NetBenefits landing page for Personalized Planning & Advice. The header includes the Fidelity logo, a search bar, and navigation links for Home, Accounts & Benefits, and Plan & Learn. A navigation bar at the top right shows 'THETA CORPORATION' with a help icon, a user profile icon, and a 'Log out' link. A blue banner below the header contains a question: ' Unsure if Personalized Planning & Advice® is right for you? Fidelity's broad range of investing strategies are designed to meet the needs of every investor. Explore other ways we can help.' The main content area features a large heading 'Fidelity® Personalized Planning & Advice' with a sub-heading 'A personalized investment strategy designed to help you achieve your retirement goal.' and a 'View your proposal' button. To the right is an image of a man in a denim shirt looking at his smartphone. Below this is a 'Limited time offer' notification: 'Sign up for Personalized Planning & Advice by June 27th and we'll waive the advisory fee for you for the first 90 days.' The central message is 'It's time to put our experience to work for your retirement'. Three columns of benefits are listed: 1. 'We'll create a personalized investment strategy for you' (based on financial situation, time horizon, risk tolerance, and other accounts). 2. 'We'll professionally manage your retirement account' (research, strategy, and adjustments). 3. 'We're here to help answer your questions' (available by phone, ask questions, and periodic outreach). A 'View your proposal' button is centered below these columns. At the bottom, a section titled 'Let us help get you on the right track for retirement' includes three steps: 'Review your info' (provide financial information), 'Get your personalized proposal' (receive investment strategy and learn how savings work together), and 'Monitor your progress' (access planning dashboard for personalized plan and estimates).

# PP&A Awareness Campaign: E-mail destinations

## Appointment scheduler

- Participants can schedule a 30-minute phone appointment for a time that is convenient for them.

The screenshot shows a web interface for scheduling an appointment. At the top, there are three navigation tabs: "Planning & Advice", "News & Research", and "Products". The main heading is "Availability of Fidelity Planning Consultants". Below this, a prompt says "Select a date and time for a 30 minute phone appointment".

The interface includes a "Select date" field with a calendar icon and the text "Jan 22, 2024". To the right, there is a dropdown menu for "Time shown in: Central Time". Below these elements is a calendar grid showing the days from Monday, Jan 22 to Friday, Jan 26. The grid displays available appointment times for each day, ranging from 7:30 AM to 11:00 AM in 30-minute increments.

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

# PP&A Awareness Campaign: NetBenefits® experience

The screenshot shows the Fidelity NetBenefits homepage for Theta Corporation. At the top, there's a search bar and navigation links for Home, Accounts & Benefits, and Plan & Learn. The main content area features a 'Portfolio total' of \$270,241 and 'Health & Insurance' of \$191.14. A prominent message states: 'Set goals, track your progress, and take control. Manage your plan'. Below this, a notification banner offers a limited time offer to sign up for Personalized Planning & Advice by June 27th. The 'Your accounts and benefits' section lists several accounts: THETA SAVINGS PLAN (\$180,465.00), PRISM 401(k) (\$44,500.00), FIDELITY IRA (\$36,400.00), and FIDELITY BROKERAGE (\$8,876.00). A 'You might need a boost to your contributions' section includes a progress bar showing a current contribution rate of 7% and a goal of 35% to reach a savings goal of \$350K. The page also includes sections for 'PENSIONS' and 'THETA SAVINGS PLAN'.

Homepage

The screenshot displays the 'Fidelity® Personalized Planning & Advice' overview page. It features a header with navigation links and a main heading: 'Fidelity® Personalized Planning & Advice'. A sub-heading reads: 'A personalized investment strategy designed to help you achieve your retirement goal.' A 'Limited time offer' banner is present. The page is divided into three main columns: 'We'll create a personalized investment strategy for you', 'We'll professionally manage your retirement account', and 'We're here to help answer your questions'. Each column contains a list of bullet points detailing the service's benefits. At the bottom, there are three sections: 'Review your info', 'Get your personalized proposal', and 'Monitor your progress', each with a brief description and a 'View your proposal' button.

PP&A overview page

The screenshot shows the 'DC Summary' page for Theta Corporation, Inc 401K (29087). The page has a header with navigation links and a main heading: 'DC Summary'. Below this, there's a 'BALANCES' section with a highlighted message: 'Interested in trying a managed account? Enroll before [OfferEndDate], and we'll waive the advisory fee for the first [DiscountPeriod] days.' The 'Balance' section shows a current balance of \$123,456.78 as of August 1, 2023, and a vested balance of \$123,456.78. The page also includes sections for 'Summary', 'Contributions', 'Investments', and 'Plan information'.

DC Summary

The screenshot displays the 'Investment strategies' page. It features a header with navigation links and a main heading: 'Investment strategies'. A sub-heading reads: 'No matter where you are in your retirement journey, you have access to a range of resources to give you the confidence you need.' Below this, there's a 'How would you like your investments managed?' section with three options: 'Single fund strategy', 'Managed account', and 'Build your own portfolio'. Each option includes a brief description, a 'Target date fund?' or 'Advisory fee applies?' indicator, and a 'Learn more' button.

Investment Strategies

# Important Additional 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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