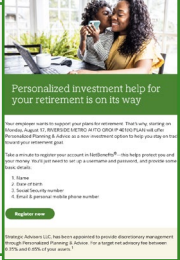
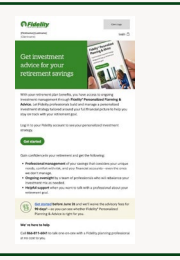
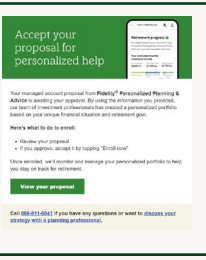
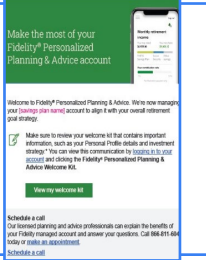
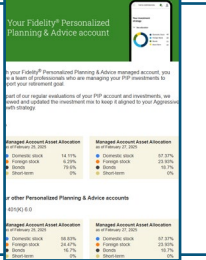
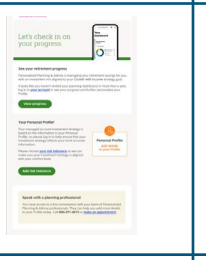
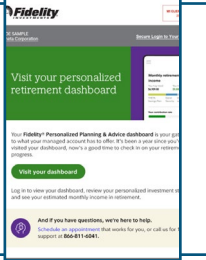
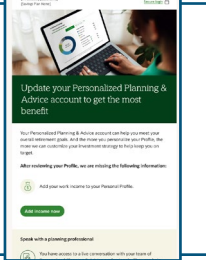
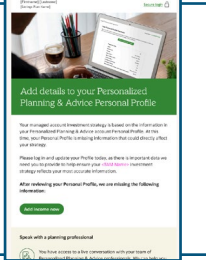


Fidelity® Personalized Planning & Advice Centrally deployed campaigns for participants

← ELIGIBLE →

← ENROLLED →

Awareness		Consideration		Onboard	Personalize & Maximize				
Activation	PP&A Awareness	Re-engagement	Onboarding	Investment Strategy	Quarterly Check-In	Anniversary	Engagement Triggers	Personal Profile Reminders	Low Personalization Reminder
									
Description: Announces the availability of the new PP&A service to plan participants after a plan adds PP&A as a plan feature	Description: To provide awareness and education on what a managed account offers and to consider if a managed account is right for them	Description: Re-engages participants that started their Personal Profile or generated a Proposal to return and learn more or complete their enrollment	Description: To welcome participants and promote personalizing their Personal Profile and visiting their PP&A planning dashboard	Description: To inform participants of their personalized investment strategy and keep them aware of any account reviews or changes as part of on-going management	Description: To engage participants quarterly with a snapshot of their plan, drive planning dashboard visits, and helping ensure their Profile is kept up to date	Description: To provide participants with their retirement readiness score and target asset allocation compared to the previous year	Description: To target and help ensure participants are engaging with and making the most of their managed account	Description: Targets participants who have not yet personalized their Profile	Description: Targets participants who are considered low personalized within their Personal Profile
Opt-Out Available? Yes	Opt-Out Available? Yes	Opt-Out Available? Yes	Opt-Out Available? No	Opt-Out Available? No	Opt-Out Available? No	Opt-Out Available? No	Opt-Out Available? No	Opt-Out Available? Yes	Opt-Out Available? Yes
Format: Email, print backup for touch 1 and 2	Format: Email only	Format: Email only	Format: Email, print backup for touch 1 only	Format: Email, print backup	Format: Email, print backup	Format: Email, print backup	Format: Email only	Format: Email, print backup	Format: Email, print backup
Time/Cadence: ~35 prior days prior to the plan going live with PP&A	Time/Cadence: Annually	Time/Cadence: Ongoing trigger	Time/Cadence: Responsive, upon enrollment, touches sent every week	Time/Cadence: Responsive, sent after every rescore and/or Profile update	Time/Cadence: Sends quarterly	Time/Cadence: Responsive, sent to all participants on their anniversaries with the service	Time/Cadence: Responsive, sent to participants who have not visited their PP&A dashboard or updated their Personal Profile within the past year	Time/Cadence: Quarterly (March, June, September, & December)	Time/Cadence: Annual (December)
Options: 4 touches	Options: 3 touches	Options: 2 touches	Options: N/A	Options: N/A	Options: N/A	Options: N/A	Options: N/A	Options: N/A	Options: N/A

For plan sponsor use only.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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