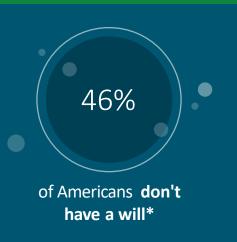
# Fidelity Estate Planner



#### \*Gallup, June 2021

The information that Participants input into this Service, and the educational outputs that are provided to Participants, are not a substitute for formal estate planning with an attorney and in no way create valid and/or legal estate planning documents. The goal of this Service is to provide users with an organized way of consolidating information necessary to create an estate plan. The creation of requisite legal documents and the implementation of an estate plan is a separate process. The information and content contained in this Service is not a substitute for the advice of an attorney.





https://www.fidelity.com/estateplanner



Fidelity Estate Planner® is an interactive on-line experience designed to make it easier for your employees to create or update their estate plan.



#### Why Fidelity?

Fidelity Estate Planner can help make estate planning easier to understand by simplifying the process for employees regardless of their family situation. It integrates an educational tool with curated resources to make it easier to take action.

- Fidelity's Attorney Access Network: Curated list of Estate Planning attorneys throughout the U.S.
- FidSafe: Secure, easy, free document storage from Fidelity to store, access and share digital copies of your family's most important documents
- Fidelity's account aggregation tool enables you to view all of your assets in one place

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#### Benefit to Employees

Fidelity Estate Planner is uniquely designed to digitally guide employees through the estate planning process. Employees get:

- Informed: Clear and simplified education
- Organized: Comprehensive Estate Planning Summary that can be used to guide attorney discussions
- Connected: Easily identify an attorney through direct access to Fidelity's Attorney Access Network; Access or find resources for working with their estate planning attorney
- Next Steps: Guidance on estate plan impact to their financial accounts



# Benefit to Employers

Fidelity Estate Planner is available to the employer and employee at no cost. It can help employees ensure that they have the legal documents in place to protect their wishes and their family.

- Comprehensive digitally guided support wrapped into one experience for broad based employee appeal
- Helps employees get educated, organized, and confident in moving forward with appropriate legal support by providing them access to a digitally guided experience

FIDELITY POINT SOLUTIONS

## Fidelity Estate Planner



The Fidelity Estate Planner® is not an attorney referral service. Participating attorneys, or their respective law firms, have not paid a fee or compensation to be included or listed in the Fidelity Estate Planner, nor does Fidelity receive any fee or compensation for providing the law firm and attorney contact information to its customers. Fidelity does not recommend or endorse any law firm or attorney listed in the Fidelity Estate Planner. Fidelity is not assessing your legal needs or providing legal advice in the Fidelity Estate Planner. There is no requirement that you select any of the law firms or attorneys in the list. You are free to select any law firm or attorney of your choice. The Fidelity Estate Planner is educational in nature and is not intended to serve as the primary basis of your estate and/or tax planning discussions.

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