

Caregiving Support

More than
60% of
caregivers

report heightened stress*

*AARP article on the impact of caregiving responsibilities and stress level. (2023)

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Details are as of August 2024 and are subject to change.

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Front side can be used as standalone; back side must be accompanied by front side



CAREGIVING



Wellthy is a digital platform that connects families with an expert to help them tackle the logistical and administrative aspects of care



Why Wellthy?

Wellthy provides a comprehensive care solution that includes access to a dedicated Care Coordinator as well as digital tools to help caregivers organize and communicate with their care team:

- Covers all aspects of caregiving including medical, housing, financial, in-home, legal and social emotional
- Robust case management
- Additional resources available through webinars/content
- 24/7 access to an online platform where they can manage their care plan and organize important documents, appointments, contacts, medication lists, etc.
- Provides service nationwide in the U.S.



Benefit to Employees

Receive personalized support to help them tackle the administrative and logistical tasks of caring for loved ones:

- Professional Care Coordinator: Guides the user's whole family through a care plan and advocates for their loved one.
- Help with numerous tasks, for example:
 - schedule appointments
 - source and vet in-home aides
 - handle a move into a care facility
- Special Fidelity Discount: 10% discount off the monthly care project fee
- Free Platform Access: Features virtual learning, workshops, shared calendar as well as a 'Care Dashboard' that keeps everything safe, accessible and organized



Benefit to Employers

Provide robust support for your employees caring for loved ones with complex, chronic and ongoing care needs:

- Reduce employee stress by helping them set up a care plan and navigate the complexities of caring for a loved one
- Provide expert support and resources to reduce employees' time and energy spent on caregiving activities which can help decrease distraction and improve productivity at work
- Connect employees with a dedicated care concierge who will get tasks done on their behalf, allowing for fewer missed meetings and reduced time away

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Executive overview

Wellthy supports families with complex, chronic and ongoing care needs. The company was founded in 2014 and is headquartered in New York, NY. The founder and CEO, Lindsay Jurist-Rosner's mission and that of her company is to reshape family care and create a better experience for caregivers and their loved ones. Wellthy adds a layer of much-needed customer service to the health system — giving families help, hope and peace of mind.

Data security & privacy

Please refer to Wellthy's privacy policy ([linked here](#)).

This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3rd party is solely responsible for the information and services it provides.

Participant experience

The Financial Wellness experience will include a direct link to Wellthy. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.

Data & reporting

Fidelity will not send any personal data to Wellthy. All personal data will be entered by employees directly on Wellthy's site. Fidelity may send Wellthy an anonymized client indicator for each employee that follows a link to Wellthy's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.

Cost to participants

Users will have access to the Wellthy platform for free

Users will also receive a 10% discount on the cost for a dedicated Care Coordinator or \$405 per care project per month

Sometimes there are additional fees when setting up services and professionals (i.e. transportation, an in-home aide) that are not covered by insurance. Wellthy will always provide transparent information and options when there are out-of-pocket fees involved.

Fidelity compensation

Fidelity will not receive any compensation from Wellthy.