

Elder Fraud & Protecting Family Financial Health

1 in 5 seniors

Have been a victim of fraud, losing an average of \$120K*



Guard against scams, fraud and identity theft across bank and investment accounts, credit cards, credit reports, real estate records, and the Dark Web with a specialized focus on seniors



Why Eversafe®?

EverSafe provides financial monitoring and identity theft services that protect the whole family and offers a specialized focus on seniors:

- Around-the-clock protection and alerts for suspicious activity across bank and investment accounts, credit cards, credit reports, real estate records, and the Dark Web
- Enhanced analytics build a personal profile that 'knows' an individual's financial behavior
- Consolidated dashboard simplifies monitoring across accounts and institutions
- Exclusive "trusted advocate" feature enables caregivers, loved ones, and professionals to serve as an 'extra set of eyes' in monitoring



Benefit to Employees

Gain peace-of-mind that loved one's finances are monitored and protected from fraud and aging issues:

- Receive personalized alerts that identify potential fraud, identity theft or financial mistakes
- Allows users to designate caregivers and/or trusted professionals to receive alerts
- Suspicious activity alerts are delivered by email, text, phone or app
- Consolidated family dashboard shows all accounts in one place
- Notices about unpaid bills, changes in spending habits, and more
- Special Fidelity Discount: 20% discount on all protection packages as well as a free 30-day trial



Benefit to Employers

Provide protection for your employees concerned with financial fraud, identity theft and financial mistakes, particularly for those that are caregiving for an aging loved one:

- Provide another tool for helping employees reduce their effort, stress and time spent on caregiving activities
- Reduce employee stress by providing a proactive fraud monitoring solution for the employees' family members of all ages
- Minimize impact on employee work productivity related to the time and effort needed to resolve and repair issues related to aging, fraud and identity theft

*EverSafe 2024
EverSafe and Fidelity Investments are independent entities and are not legally affiliated.

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

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Executive overview	EverSafe® provides financial monitoring and identity theft services that protect the whole family and offers a specialized focus on seniors. They provide around-the-clock protection and alerts to family members, designated caregivers and/or professionals for suspicious activity across bank and investment accounts, credit cards, credit reports, real estate records, and the Dark Web.
Data security & privacy	<p>Please refer to EverSafe's privacy policy (linked here).</p> <p>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.</p>
Employee experience	<p>The Financial Wellness experiences will include a direct link to EverSafe. 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.</p> <p>EverSafe may email, text, or call employees if the employees choose to engage with EverSafe.</p>
Data & reporting	Fidelity will not send any personal data to EverSafe. All personal data will be entered by employees directly on EverSafe's site. Fidelity may send EverSafe an anonymized client indicator for each employee that follows a link to EverSafe'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 employees	Employees will receive a 20% discount off all three protection plans offered by EverSafe including a 30-day free trial if they utilize the link from NetBenefits.
Fidelity compensation	Fidelity will not receive any compensation from EverSafe.