Communications to **welcome**, **know** and **help** employees

April	May	June
PROACTIVE CALENDAR AND EVENT-BASED COMMUNICATIONS		
• FidBits Newsletter • PP&A Enrolled Quarterly Check-In • PP&A Eligible Awareness • HSA Annual Investing Campaign	• FidBits Newsletter • Healthcare Month • HSA Parents of Young Adults Campaign	• Quarterly Check-In
Review existing responsive communications any time in the C&E Resource Center		
• Quarterly Statement Reminder		
PLAN SPECIFIC COMMUNICATIONS AND EVENTS		

Q2 2024: AT A GLANCE

Communications to **welcome, know** and **help** employees

April

FidBits Newsletter – Employees will receive educational resources such as podcasts, webcasts, and articles, so they can be better prepared to navigate life's challenges and help them become more financially savvy, no matter where they are in their financial journey.

PP&A Enrolled Quarterly Check-In – Informs enrolled participants of their investment strategy, progress towards goals, and next steps to consider, including Personal Profile review and update.

PP&A Awareness – Educates employees on the benefits of Fidelity® Personalized Planning & Advice and how our team of experienced professionals can create and manage an investment strategy for your employees based on their financial situation.

HSA Annual Investing Campaign – Educates participants about their ability and the potential benefits of investing the savings in their HSA, and tells them how to setup automatic investing.

May

FidBits Newsletter – *See April description.*

Healthcare Month – In celebration of the dedication and commitment of all healthcare workers, Fidelity is offering custom events and resources to help your employees make progress on their money goals.

HSA Parents of Young Adults Campaign – This new campaign targets Fidelity HSA accountholders who have beneficiaries or dependents age 21-25. The goal of this campaign is to provide parents with educational content they can pass onto their loved ones about the benefits of opening an HSA.

June

Quarterly Check-In – Provides employees with a personal assessment of their retirement savings progress and next steps, along with resources to help build their confidence in managing everyday financial matters.