

Student Debt Retirement participant experience

Sent quarterly in Q1, Q2, Q3

Enrollment flow starts with enrollment invite sent to all SDR eligible not enrolled on day 0 OR upon eligibility

START

Enrollment

Enrollment invite

Benefit landing page

Enrollment experience

Enrollment confirmation

Upload and track payments

Add payment notification

How-To Guide*

Print sent if no email on file

7 days default, plan sponsor configurable

Awareness*

Announcement + education emails*

Getting Started Guide*

Print backup postcard

Stuck between student debt and saving for retirement

Digital signage and bricklets*

Enrollment reminder

Make your student debt work for you

Triggered upon experience abandonment

Awareness email, touch 1

Awareness email, touch 2

Save for your future while taking care of your today

Abandoner email, touch 1

Help with your student debt is closer than you think

Abandoner email, touch 2

Don't leave money behind

Sent Q4 only

Annual review open notification

Is your student loan payment data accurate?

Annual review closing notification

Your payment review period ends February 15, 2024

Annual review

Contribution

End-of-year contribution email

Congratulations—you're making your student debt work for you

Biannual awareness campaign

Abandonment

Campaign send March 1 / August 1 to SDR eligible not enrolled

Live late November 2024

Materials marked with an asterisk (*) and bounded by a dotted line available for use in the PSW; please note these materials are NOT sent by Fidelity.