Subject line: You have options for your loved one's retirement plan assets
Preheader: We can help you make an informed decision.

Touch 1 – Advice

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Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

<FIRSTNAME LASTNAME>
<Plan Name>

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Fidelity can help you review your choices about the retirement plan assets you received.

Deciding what to do with a loved one's assets, while dealing with their loss, can be an emotional and overwhelming experience. We want to help you move forward at a pace that makes you feel comfortable.

Depending on your situation and needs,[1] you may be able to do the following:

- Leave the money in its current plan.
- Roll over the money into a new, existing, or inherited IRA.
- Cash out the money if you need immediate access.

Figure out what's right for you

Want some help?

- Call us at **866-811-6045** or **schedule a 1-on-1** at a time that's convenient for you.
- Use our **life events resources** to help you whenever you're ready.

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Investing involves risk, including risk of loss.

Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

1. Plan rules vary. You may be required to take action within a specified time period. Be sure that you understand the tax consequences of any withdrawal from the plan. The IRS generally requires you to take annual required minimum distributions (RMDs) beginning at age 73 from your tax-advantaged retirement accounts (excluding Roth IRAs).

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Consult an attorney or tax professional regarding your specific situation.

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