

Subject line: Taking over a loved one’s assets? You have options
Preheader: We can help you figure out what’s right for you.

Touch 2 – Non-Financial Wellness

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<FIRSTNAME LASTNAME>
<Plan Name>

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We can help you understand your options
and determine what may work for you.

We wanted to check in to see how you were doing and if you had any questions about your **distribution options**.

If you’d like to explore some next steps for your new money and ways to help maximize it for now and the future, we’re here to help. Here are some options:



Call us at **866-811-6045** or **schedule a 1-on-1** at a time that's convenient for you.
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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.

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Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

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