Subject: Reminder: View your enhanced proposal today
Preheader: See the enhancements coming to your Personalized Planning & Advice account.

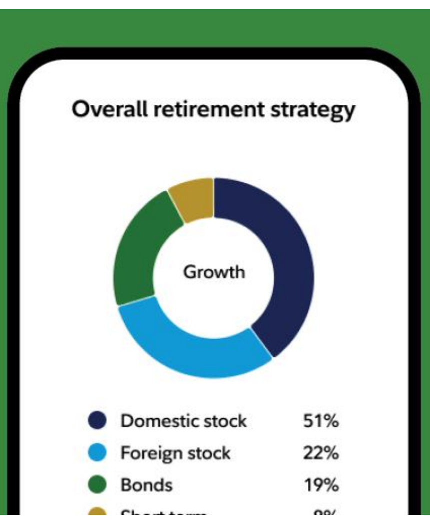
Fidelity INVESTMENTS

Client Logo

[Firstname] [Lastname]
[Clientname]

Login

Get your updated investment strategy today



As a reminder, we will be enhancing your **Fidelity® Personalized Planning & Advice** account, including updating your personalized investment strategy, to help strengthen your retirement outcome.

Review and accept your enhanced proposal to **receive your updated investment strategy today**. Please note that if no action is taken by <plan re-score date>, the enhanced methodology will be automatically applied to your account.[1]

View enhanced proposal

Here is a preview of your current investments and your anticipated enhanced investment mix:[2]

Managed account investment mix based on current methodology:

- Domestic stock: <XX.X%>
- Foreign stock: <XX.X%>
- Bonds: <XX.X%>
- Short-term: <XX.X%>
- Other: <XX.X%>

Managed account investment mix based on enhanced methodology:

- Domestic stock: <XX.X%>
- Foreign stock: <XX.X%>
- Bonds: <XX.X%>
- Short-term: <XX.X%>
- Other: <XX.X%>

Connect with a Personalized Planning & Advice professional

We're here to help you understand your updated proposal and anticipated changes to your investment mix. Call **866-811-6041** or schedule an appointment at your convenience.

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Investing involves risk, including risk of loss.

[1] **Please note:** If you do not take action by <plan re-score date>, the enhanced methodology will be automatically applied to your account. This date is subject to change. If you are enrolled in Personalized Planning & Advice in more than one savings plan, the enhanced methodology will be applied for all your plans based on the plan with the earliest automatic application date.

[2] Analysis is based on a hypothetical application of the methodologies to your account utilizing your latest profile responses and balance information as of <Month, Day Year>. Actual results will vary based on changes to profiling responses, asset balance totals, and updates to your investment strategy driven by the advisor.

Fidelity® Personalized Planning & Advice (the "Service") does not manage BrokerageLink assets; however, the Service does consider the equity portion of the BrokerageLink assets. However, after enrollment in the Service, depositing additional money into BrokerageLink is not allowed.

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