PP&A Participant Re-Engagement Campaign

Previously known as "Abandoner"

Campaign Overview

Campaign Overview

Two-touch email campaign to re-engage participants who have indicated interest in PP&A

Objective

- Take responsibility to re-engage participants who've indicated interest in exploring PP&A as a do-it-for-me investment solution
- Reinforce the value that PP&A provides in creating an investment strategy based on the participant's unique situation
- Reassure participants that Fidelity's here to help, no matter the markets or the complexity of their needs

Audience

- Participants who indicated interest in PP&A but may need more information or time to enroll
    - Completed their Personal Profile online or with a phone representative but didn't enroll
    - Started but didn't complete their Personal Profile
    - Visited the NetBenefits PP&A landing page

Campaign structure

- Ongoing, automatically trigger; no action needed from the sponsor
- 2 emails sent to each participant, unless participant enrolls or makes an asset allocation change after the first
- First email sent 2 days after engagement, with second email sent 5 days later
- No print backup due to campaign timeframe

Click thru destination

- Personalized proposal or the PP&A landing page, as well as the Workplace Planning phone number
- If your plan is offering an incentive during the campaign timeframe, incentive information and deadline will also be included

Email Cadence

Email Cadence

Touch 1 is sent 2 days after initial engagement, with Touch 2 as a follow-up 5 days later.

Touch 1A
Completed or started Personal Profile
Sent 2 days after leaving experience

or

Touch 1B
Visited PP&A eligible landing page
Sent 2 days after leaving experience

Touch 2*
Both audiences
Sent 7 days after leaving page

Subject line: You're almost there! Complete your enrollment and we'll develop an investment strategy that takes into account your unique financial situation.
Preheader: You've made it this far! Now, let's help get you on the path to retirement.

View this email in your browser

Fidelity INVESTMENTS — Client Logo

FIRST NAME LAST NAME
Plan Name
Secure Login to Your Account

Need help enrolling in Fidelity® Personalized Planning & Advice?

Thank you for your interest in Personalized Planning & Advice and for starting the enrollment steps. As a reminder, we'll develop an investment strategy based on your personal situation and can take into account your overall financial picture.

The market has ups and downs, so we'll create an investment plan for your retirement savings that balances risk and reward based on your comfort level. We'll also keep your investment strategy aligned to your goals to help you stay on track for retirement.

Review your personalized proposal and complete your enrollment today.

For help enrolling or to discuss, call 866-811-6041.

Subject line: Navigating the market on your own? We can help. Call 866-811-6041.
Preheader: You've made it this far! Now, let's help get you on the path to retirement.

View this email in your browser

Fidelity INVESTMENTS

FIRST NAME LAST NAME
Plan Name
Secure Login to Your Account

Get a personalized retirement investment strategy that takes into account your unique financial situation

We'll develop an investment strategy that balances risk and reward based on your comfort level and that aligns to your goals to help you stay on track for retirement.

- YES! Let's develop my investment strategy together. Or call 866-811-6041 to get investment help from our team of licensed professionals.

Subject line: Navigating the market on your own? We can help. Call 866-811-6041.
Preheader: You've made it this far! Now, let's help get you on the path to retirement.

View this email in your browser

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FIRST NAME LAST NAME
Plan Name
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Feel more secure in your retirement plan with a personalized investment strategy.

With Fidelity® Personalized Planning & Advice, we'll create a personalized investment strategy designed to help you manage your retirement goals.
- We'll create an investment plan for your retirement savings that balances risk and reward based on your comfort level
- We'll keep your investment strategy aligned to your goals to help you stay on track for retirement

Enroll now »

Let's look at your retirement plan with a fresh perspective. Get investment help from our team of licensed professionals at 866-811-6041.

Message focused on re-engagement

Message focused on the value of PP&A

*Will not be sent if the participant enrolls or makes an asset allocation change after Touch 1

Screenshots, content, and graphics are for illustrative purposes only

Email Samples

Touch 1A

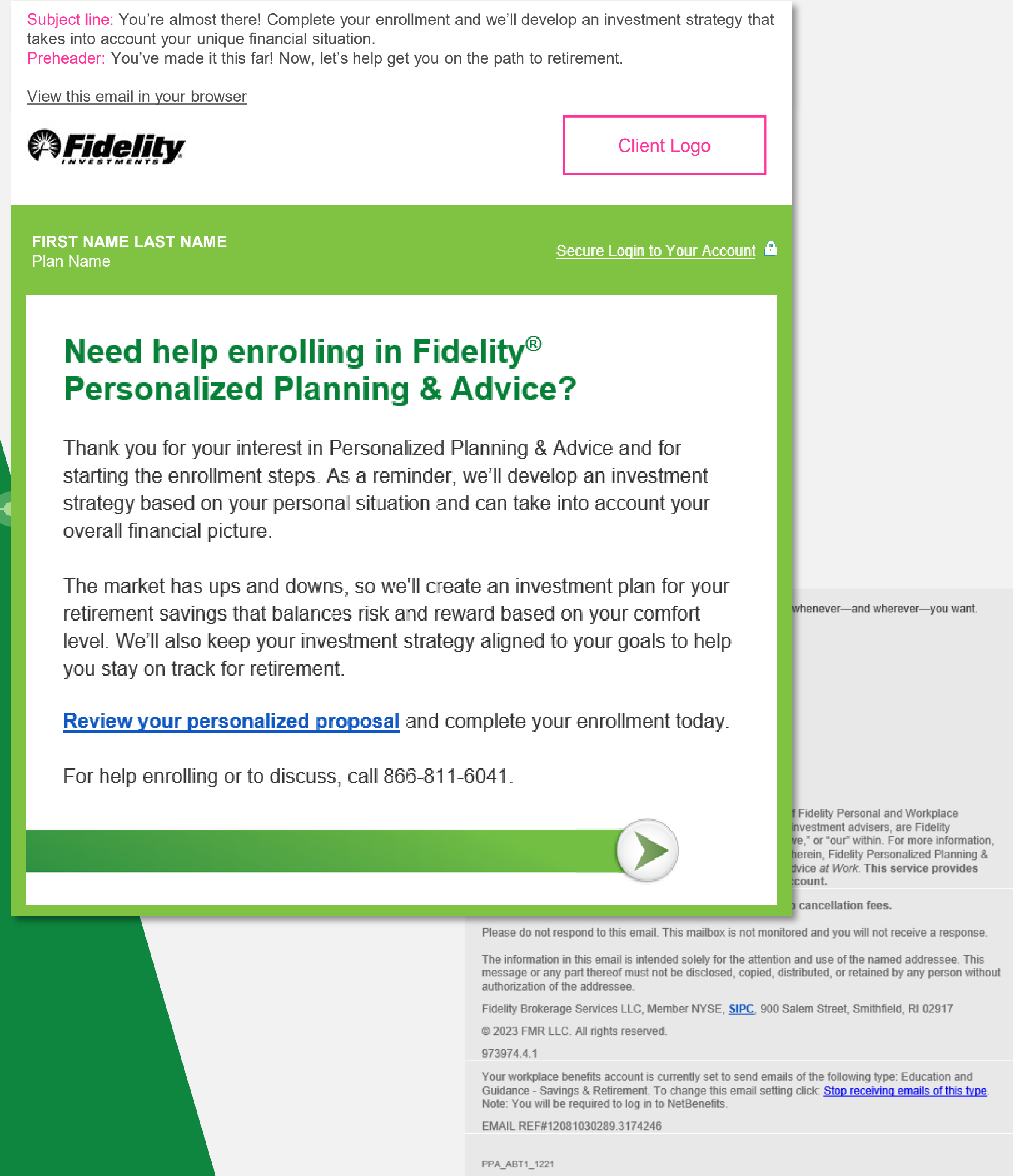
Message around enrollment support

Sent to participants who:

- **Completed their Personal Profile and received a personalized proposal either online or with a phone representative**
- **Started but didn't complete their Personal Profile**

Sent 2 days after creating their proposal or beginning their Personal Profile

Drives to the proposal page



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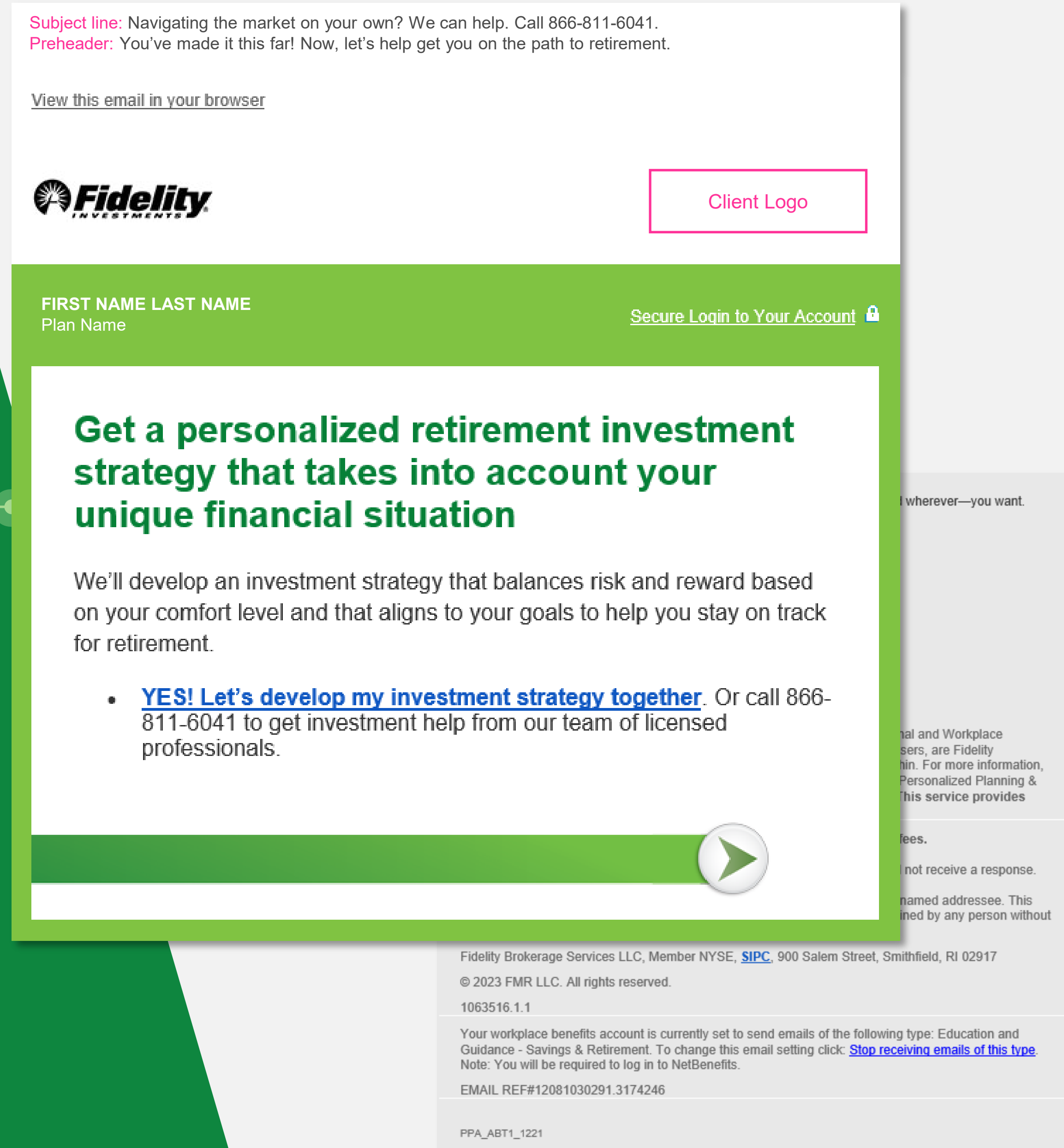
Touch 1B

Message around enrollment support

Sent to participants who visited the PP&A landing page

Sent 2 days after page visit

Drives to the PP&A landing page



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Touch 2

Message reinforcing the value of PP&A, so participants can better understand if it's right for them

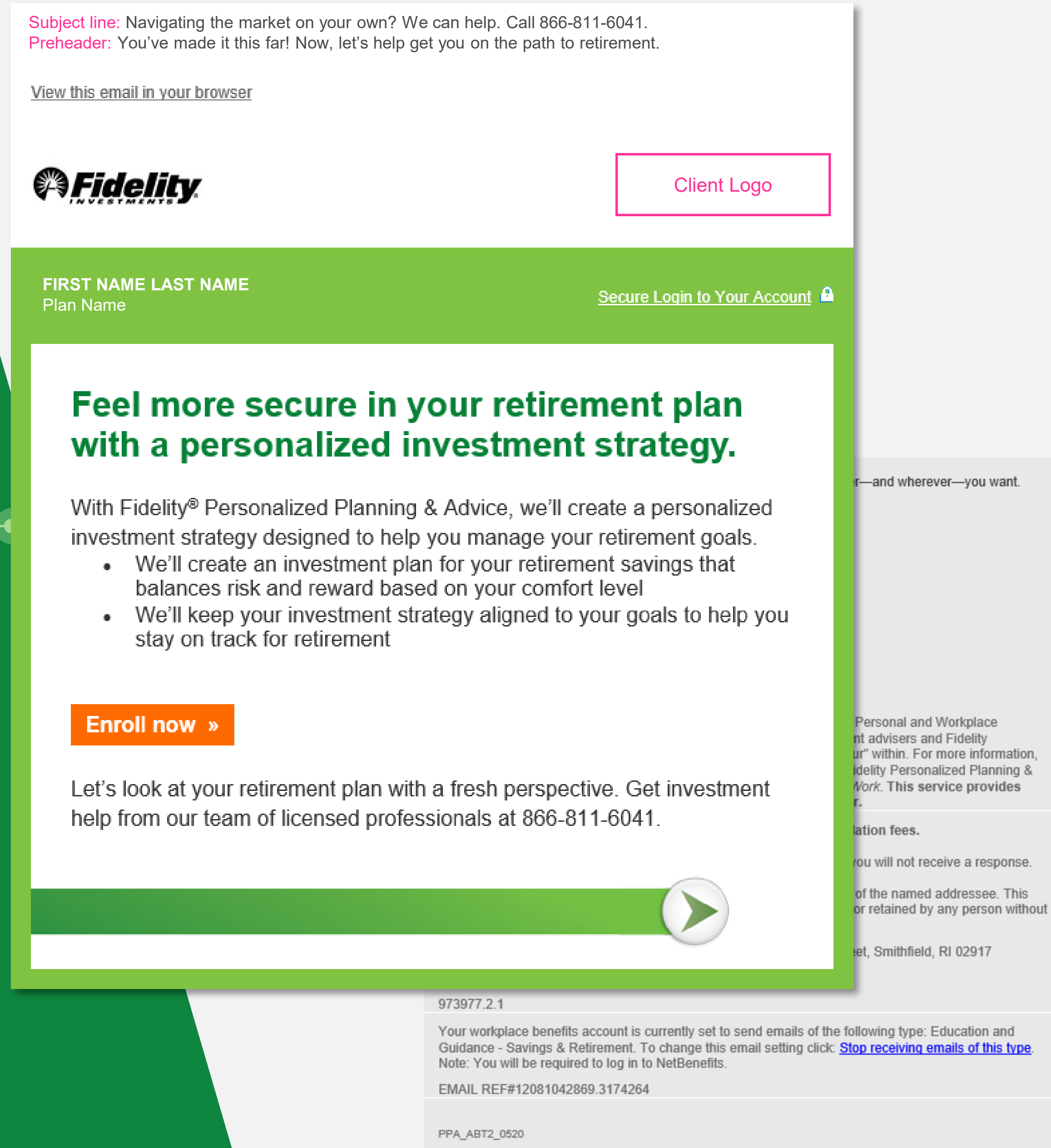
Sent to all participants who have indicated interest in PP&A

- **Received a proposal**
- **Started their Personal Profile**
- **Visited the PP&A landing page**

Sent 5 days after Touch 1

Will not be sent if the participant enrolled or made an asset allocation change after receiving Touch 1

Drives to the proposal page (for those who started or completed their Personal Profile) or PP&A landing page



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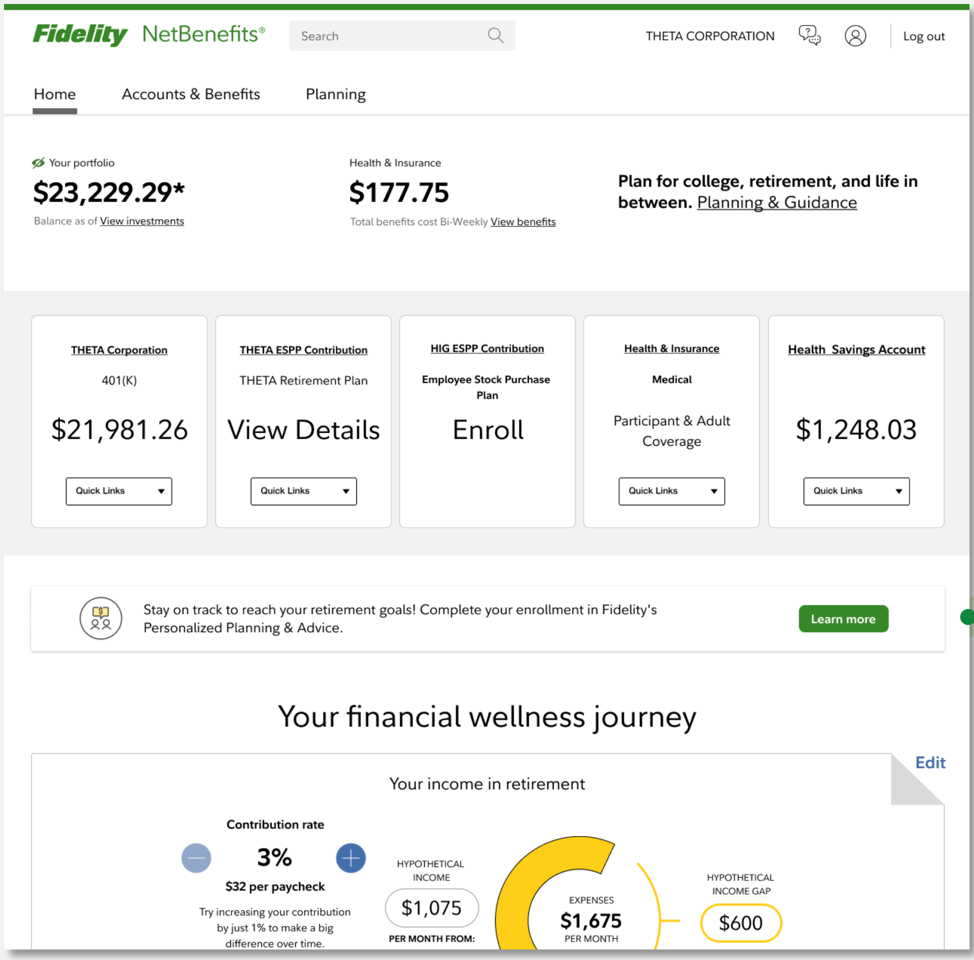
NetBenefits Re-Engagement Messaging

NetBenefits Re-Engagement Messaging

The re-engagement email campaign complements messaging on NetBenefits for those who began their Personal Profile or received their personalized proposal but did not enroll.



Personalized re-engagement messaging appears for participants who began their Personal Profile or received their personalized proposal but did not enroll

Participants who visited the PP&A landing page but did not begin their Personal Profile see our standard homepage messaging

Disclosures & Fee Presentation

= Advisory Fee Notice

Touch 1A

Subject line: You're almost there! Complete your enrollment and we'll develop an investment strategy that takes into account your unique financial situation.
Preheader: You've made it this far! Now, let's help get you on the path to retirement.

View this email in your browser

Fidelity INVESTMENTS

Client Logo

FIRST NAME LAST NAME
Plan Name

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Review your personalized proposal and complete your enrollment today.

For help enrolling or to discuss, call 866-811-6041.

Download the free NetBenefits® app to manage your accounts whenever—and wherever—you want.

Download on the App Store | GET IT ON Google Play

Learn more about what the app can do for you.

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973974.4.1

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Note: You will be required to log in to NetBenefits.

EMAIL REF#12081030289.3174246

PPA_ABT1_1221

= Advisory Fee Notice

Touch 1B

Subject line: Navigating the market on your own? We can help. Call 866-811-6041.
Preheader: You've made it this far! Now, let's help get you on the path to retirement.

View this email in your browser

Fidelity INVESTMENTS

Client Logo

FIRST NAME LAST NAME
Plan Name

Secure Login to Your Account

Get a personalized retirement investment strategy that takes into account your unique financial situation

We'll develop an investment strategy that balances risk and reward based on your comfort level and that aligns to your goals to help you stay on track for retirement.

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PPA_ABT1_1221

= Advisory Fee Notice

Touch 2

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Fidelity INVESTMENTS

Client Logo

FIRST NAME LAST NAME
Plan Name

Secure Login to Your Account

Feel more secure in your retirement plan with a personalized investment strategy.

With Fidelity® Personalized Planning & Advice, we'll create a personalized investment strategy designed to help you manage your retirement goals.

- We'll create an investment plan for your retirement savings that balances risk and reward based on your comfort level
- We'll keep your investment strategy aligned to your goals to help you stay on track for retirement

Enroll now »

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EMAIL REF#12081042869.3174264

PPA_ABT2_0520

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