

Fidelity Goal BoosterSM



Of employees would feel a little or completely overwhelmed if an unexpected financial challenge came up, such as a medical issue.¹

¹ Fidelity Financial Wellness Checkup of more than 392,000 active workplace participants from January 1 – August 31, 2023. See back side for additional information.



<http://fidelity.com/goalbooster>

Fidelity Goal BoosterSM is a goal-based savings and investing experience designed to help savers with their emergency savings and other saving goals.



Why Goal Booster?

Fidelity Goal BoosterSM can help participants save more successfully for their savings goals – such as creating an emergency fund or buying a first home - by integrating education and goal management tools with a curated selection of Fidelity’s most affordable saving and investing products.

- Fidelity® Cash Management Account: Our no monthly fee, no minimum balance account
- Fidelity Go®: Our fully digital, professionally managed account
- Fidelity-Managed 529 Plans: flexible, tax-advantaged accounts designed specifically for education savings.
- Brokered Certificates of Deposit (CDs)
- Fidelity Money Market Mutual Funds



Benefit to Employees

Goal Booster is designed to help employees create positive near-term savings behaviors. With a personalized dashboard, users can articulate their savings goals and, when ready, leverage the simple path to Fidelity products to take action.

- Set saving goals
- Compare saving and investing products that work for each goal
- Open or link eligible Fidelity accounts
- Automate funding, track progress and easily move money to their goals.
- Take advantage of alerts and goal defenders to help stay on track



Benefit to Employers

At no cost to the employer, Goal Booster can help employees overcome common obstacles to short-term savings and overall financial wellness.

Goal Booster also helps employers:

- Provide a more relevant, short-term focused benefit for younger savers
- Ensure that all employees have a clear and dedicated path to emergency savings
- Enable an integrated approach for short-term savings that your employees can access alongside their existing retirement offerings.

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Important Information

Before investing, consider the investment objectives, risks, charges, and expenses of the mutual fund, exchange-traded fund, 529 plan, Attainable Savings Plan, or annuity and its investment options. Contact Fidelity for a prospectus, offering circular, Fact Kit, disclosure document, or, if available, a summary prospectus containing this information. Read it carefully.

Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

You could lose money by investing in a money market fund. Although the fund seeks to preserve the value of your investment at \$1.00 per share, it cannot guarantee it will do so. The Fund may impose a fee upon the sale of your shares or may temporarily suspend your ability to sell shares if the Fund's liquidity falls below required minimums because of market conditions or other factors. An investment in the fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Fidelity Investments and its affiliates, the fund's sponsor, have no legal obligation to provide financial support to the fund, and you should not expect that the sponsor will provide financial support to the fund at any time.

Fidelity Go® provides discretionary investment management for a fee. Advisory services offered by Fidelity Personal and Workplace Advisors LLC (FPWA), a registered investment adviser. Brokerage services provided by Fidelity Brokerage Services LLC (FBS), and custodial and related services provided by National Financial Services LLC (NFS), each a member NYSE and SIPC. FPWA, FBS and NFS are Fidelity Investments companies.

The Fidelity Cash Management account is a brokerage account designed for investing, spending and cash management. Investing excludes options and margin trading. For a more traditional brokerage account, consider the Fidelity Account®.

From time to time, Goal Booster may run a marketing offer to encourage employees to take action on their savings goals.

Units of the portfolios are municipal securities and may be subject to market volatility and fluctuation.

For Plan Sponsor and Investment Professional use only.

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