

Investment Help/Personalized Planning & Advice Awareness Campaign



Campaign Overview

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Our goal

Drive awareness and education about Fidelity® Personalized Planning & Advice

When

Week of April 22, 2024

Pricing incentive

Enroll by May 24, 2024, and we will waive the advisory fee for the first 90 days.

Who's included

All active and term participants in plans that offer Fidelity's managed account service

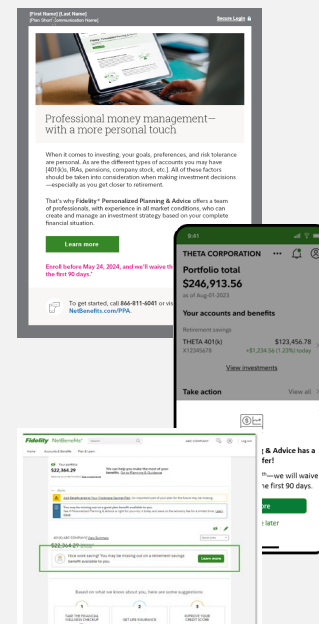
How we'll communicate

This multi-channel campaign includes an email, and NetBenefits® messaging and mobile in-app messaging.

Key participant stats

~70% of enrollments from 2023 campaign came from target date funds¹

93% of enrolled participants have stayed actively engaged in planning for retirement²



¹Fidelity analysis of March 2023 Personalized Planning & Advice campaign results. Number represents the percentage of eligible participants who enrolled in Personalized Planning & Advice from a target date fund.

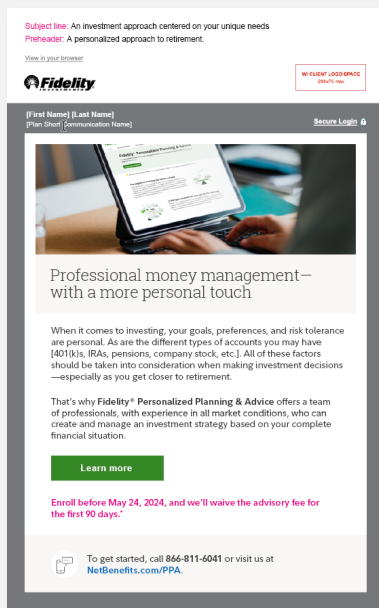
²Fidelity analysis as of September 30, 2023. Engagement is measured for both active and terminated enrolled participants in corporate DC and TEM plans with a positive balance over a period of the last 12 months. "Engaged" includes three tiers: Basic-Level Engaged, Educational Engaged, and Highly Engaged and is defined as follows: Basic Engaged: NetBenefits or Fidelity.com log-in; inbound phone call; Education Engaged: NetBenefits content views/engagement; advisory dashboard visit; financial wellness topic pages view; live events visit; Learn Hub visits; Student Debt Tool visit; Highly Engaged: Self-led or rep-led tool completion; phone guidance; onsite one-on-one meetings; Fidelity branch visits; workshop attendance; financial wellness assessment completion; IPQ update; journey space interactions; Goal Booster usage

Campaign Cadence

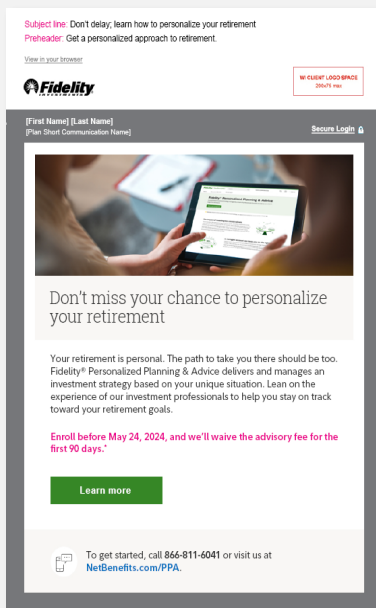
Campaign Cadence

A multi-channel communications program that includes up to two emails and mobile in-app messaging

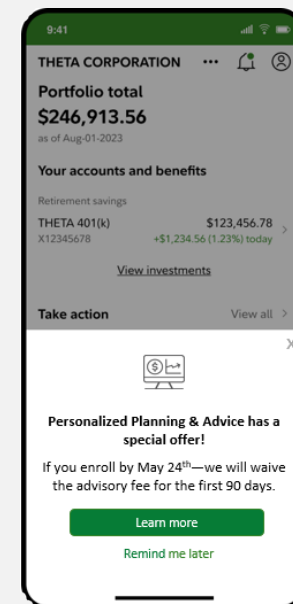
Email Touch 1
Campaign Announcement
Sent week of April 22, 2024



Email Touch 2
Campaign Reminder
Sent week of May 6, 2024



Mobile in-app
Sent during campaign



Email Sample and Links


Email Sample Touch 1 Campaign announcement


Links and calls to action:


- Personalized Planning & Advice eligible landing page
- Participants can schedule a complementary portfolio review if they have \$100,000 or more in assets

Subject line: An investment approach centered on your unique needs
Preheader: A personalized approach to retirement.

[View in your browser](#)

 W CLIENT LOGO SPACE
200x70 max

[First Name] [Last Name] Secure Login 
[Plan Short] [Communication Name]




Professional money management— with a more personal touch


When it comes to investing, your goals, preferences, and risk tolerance are personal. As are the different types of accounts you may have [401(k)s, IRAs, pensions, company stock, etc.]. All of these factors should be taken into consideration when making investment decisions—especially as you get closer to retirement.

That's why Fidelity® Personalized Planning & Advice offers a team of professionals, with experience in all market conditions, who can create and manage an investment strategy based on your complete financial situation.

[Learn more](#)

Enroll before May 24, 2024, and we'll waive the advisory fee for the first 90 days.*

 To get started, call 866-811-6041 or visit us at NetBenefits.com/PPA.

 To get started, call 866-811-6041 or schedule a **complementary portfolio review**.


Email Sample Touch 2 Campaign Reminder


Links and calls to action:


- Personalized Planning & Advice eligible landing page
- Participants can schedule a complementary portfolio review if they have \$100,000 or more in assets

Subject line: Don't delay; learn how to personalize your retirement
Preheader: Get a personalized approach to retirement.

[View in your browser](#)

 WI CLIENT LOGO SPACE
200x75 max

[First Name] [Last Name] [Secure Login](#) 
[Plan Short Communication Name]






Don't miss your chance to personalize your retirement

Your retirement is personal. The path to take you there should be too. Fidelity® Personalized Planning & Advice delivers and manages an investment strategy based on your unique situation. Lean on the experience of our investment professionals to help you stay on track toward your retirement goals.

Enroll before May 24, 2024, and we'll waive the advisory fee for the first 90 days.*

[Learn more](#)

 To get started, call **866-811-6041** or schedule a complementary portfolio review. 

 To get started, call **866-811-6041** or visit us at NetBenefits.com/PPA.

Destination webpages

Personalized Planning & Advice Eligible Landing Page*

The eligible landing page highlights key features and benefits

Fidelity® Personalized Planning & Advice
A personalized investment strategy managed by a team of professionals focused on helping you stay on target for retirement.

[View your proposal](#)

Attention: Based on what we know about your current holdings, you appear to be invested too conservatively for your age.¹

The impact of investing too conservatively
Asset allocation (the right percentage of stocks, bonds, and other investments) is the most important factor in balancing risk and reward. For example, if your allocation is heavily invested in bonds, you may be missing out on some potential gain or growth, which may impact how long it could take for you to retire. In fact, many people don't even realize when they drift off track because actively monitoring your investments requires time and energy you may not have. That's where we can help.

98% of people who enroll with us, stay.*

A managed account can help keep you on the right track
Fidelity's team of professionals will create an investment strategy based on your unique situation. They will take into account your comfort level with risk and reward and provide ongoing monitoring and management. It doesn't matter how complex your situation is—it's what we've been doing for millions of people for over 20 years.

Investing is personal, but you don't have to do it alone

- Personalized investment management**
We propose an investment strategy based on a number of factors like your age, income, and savings, and then refine it for your unique financial situation.
- Ongoing oversight and rebalancing**
Our team of investment professionals manages your diversified portfolio through market ups and downs and changes to your financial situation—and monitors and adjusts as needed.
- Support when you need it**
You'll have access to live support from licensed representatives who can speak to you about your plan so you feel confident knowing you're on the right track to reach your retirement goals.

We believe the cost of mismanagement can be greater than the cost of management
Your fee is based on a percentage of the total assets we manage for you and is automatically deducted from your plan each quarter.
View pricing for TRNETA CORP A0130/PLAN E7

0.5% advisory fee

What you pay
If you had been enrolled in this plan last quarter, your estimated monthly advisory fee would have been \$51.45, based on your current balance of \$100,000.50.

Ready to get on the right track?

[View your proposal](#)

Call 866-811-6411 | Explore other investment options | Schedule appointment

*The eligible landing page will be updated to align with the email campaign.

Appointment Scheduler

Participants can schedule a complementary portfolio review if they have \$100,000 or more in assets

The screenshot displays the 'Availability of Fidelity Planning Consultants' interface. At the top, there are three navigation tabs: 'Planning & Advice', 'News & Research', and 'Products'. The main heading is 'Availability of Fidelity Planning Consultants'. Below this, a prompt asks the user to 'Select a date and time for a 30 minute phone appointment'. The interface includes a 'Select date' field with a calendar icon and the date 'Jan 22, 2024'. To the right, there is a dropdown menu for 'Time shown in: Central Time'. Below the date field, a navigation bar shows the days of the week: 'Mon Jan 22', 'Tue Jan 23', 'Wed Jan 24', 'Thu Jan 25', and 'Fri Jan 26'. A grid of time slots is displayed for each day, with slots ranging from 7:30 AM to 11:00 AM in 30-minute increments.

	Mon Jan 22	Tue Jan 23	Wed Jan 24	Thu Jan 25	Fri Jan 26
7:30 AM					
8:00 AM					
8:30 AM					
9:00 AM					
9:30 AM					
10:00 AM					
10:30 AM					
11:00 AM					

Important Information

Investing involves risk, including risk of loss.

For plan sponsor use only.

Screenshots and graphics are hypothetical and for illustrative purposes only.

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