Investment Help/Personalized Planning & Advice Awareness Campaign

Fidelity INVESTMENTS

Campaign Overview

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Our goal
Drive awareness and education about Fidelity® Personalized Planning & Advice

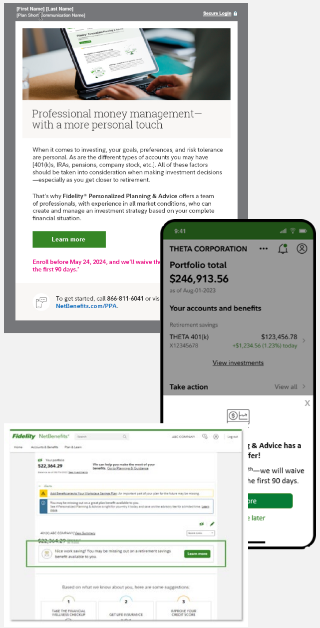
When
Week of April 22, 2024

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 funds[1]
93% of enrolled participants have stayed actively engaged in planning for retirement[2]



[1]Fidelity 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.
[2]Fidelity 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

Screenshots, content, and graphics are for illustrative purposes only

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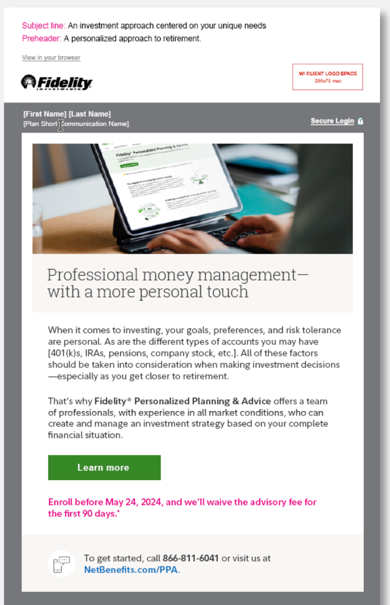
Campaign Cadence

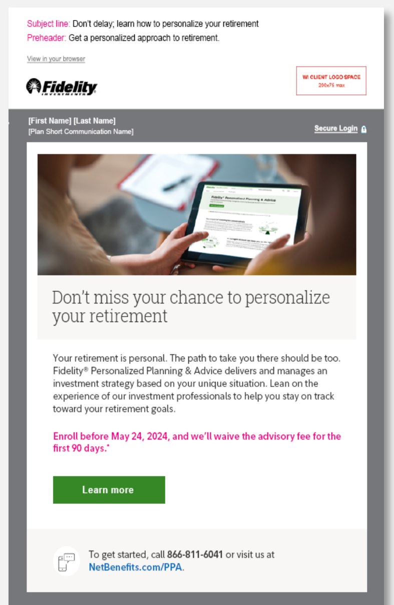
Campaign Cadence

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

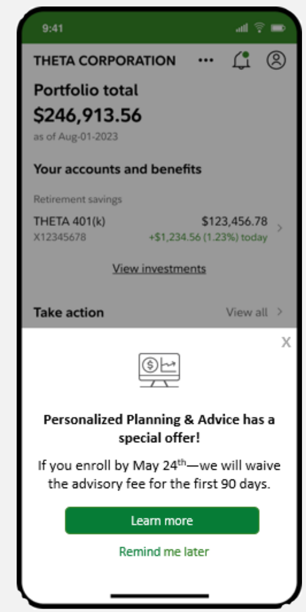
Email Touch 1
Campaign Announcement
Sent week of April 22, 2024



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



Mobile in-app
Sent during campaign



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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

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

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

Secure Login

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.

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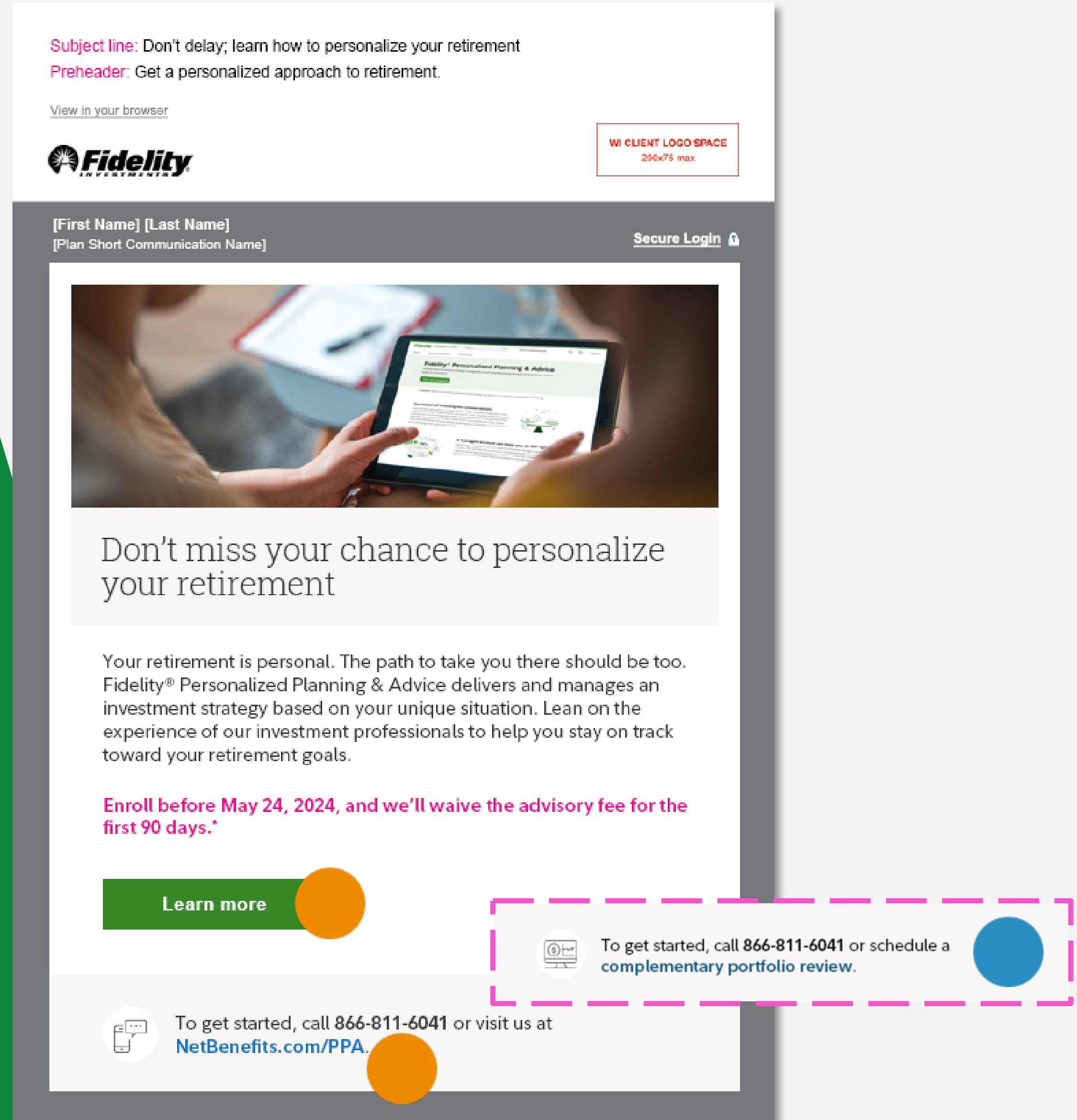
Email Sample
Touch 2
Campaign Reminder

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**



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Destination webpages

Personalized Planning & Advice Eligible Landing Page*

The eligible landing page highlights key features and benefits

*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

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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Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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