Activation email campaign for participants

Personalized Planning & Advice
November 2023

Campaign Overview

Three-touch email campaign for plans activating Personalized Planning & Advice, with supporting messaging on NetBenefits®

Objective

- Build awareness of PP&A as a newly offered service
- Educate participants on the value that PP&A delivers and help them determine if the service is right for them

Audience

- All participants in the plan's activation period

Campaign structure

- Touch 1: Change Notice - Sent 35 days prior to PP&A launch (Print Back-Up)
- Touch 2: Launch Announcement - Sent on or near date of PP&A launch (Print Back-Up)
- Touch 3: Reminder - Sent 30 days after launch
- Additional messaging on NetBenefits®

Click thru destination

- Touch 1 (Change Notice): Workplace planning phone number
- Touch 2 (Launch Announcement): PP&A landing page and workplace planning phone number
- Touch 3 (Reminder): PP&A landing page and workplace planning phone number
- If your plan is offering an incentive during the campaign timeframe, incentive information and deadline will also be included

Email Samples

Touch 1:
Change Notice

Makes participants aware of the PP&A service that's coming soon

Drives to the Workplace Planning phone number

Sent 35 days prior to launch

Subject line: COMING SOON: Personalized help to manage your retirement goals

Preheader: Your employer is adding more to your workplace benefits.

view in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

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

Secure Login

Feel more secure in your retirement plan

Managing your retirement goals and investments isn't easy—especially with all of life's other challenges. That's why, starting on <Date>, <Client Name> will offer a new benefit to help you stay on target toward retirement.

With **Fidelity® Personalized Planning & Advice**, we'll work with you to develop a personalized investment strategy to help you manage your retirement goals. We'll:

- Take into account your personal situation and overall financial picture
- Balance risk and reward based on your comfort level
- Align to your goals to help you stay on track for retirement

Strategic Advisers LLC, a registered investment advisor and Fidelity Investments company, has been appointed to provide discretionary management through Fidelity® Personalized Planning & Advice.

For an advisory fee of no more than .85% of your assets,[1] we'll partner with you to manage your hard eard-earned savings, so you can work toward your retirement goals.

Look for more details coming your way soon.

Questions? Call 866-811-6041

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5% of your average managed account balance. However,
the investments in your account and other factors. The
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our account. These are the standard expenses that all
dd/yyyy>, you may obtain additional advisory-fee
in to NetBenefits.comor by call 866811-6041.
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Touch 2: Launch Announcement

Raises awareness of the new service & its value

Links to the PP&A landing page and includes the Workplace Planning phone number

Sent on or near date of PP&A launch

Subject line: Now Available: Fidelity Personalized Planning & Advice

Preheader: We'll help you get on track for retirement.

view in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

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

Secure Login

Get a personalized retirement investment strategy

Investing for your retirement isn't easy. But no matter what stage you're at, or how complex your situation, Fidelity has a range of resources and benefits to help you feel more secure for your today and tomorrow.

Now <Client Name> is providing you with a new way to get help.

Fidelity® Personalized Planning & Advice can develop an investment strategy around your life and full financial picture. We'll balance risk and reward based on your comfort level and keep your investment strategy aligned to your retirement goals.

Talk to one of our investment professionals to learn more. Call 866-811-6041.

Learn more

<Save <X>% off the advisory fee if you enroll in Fidelity's managed account by <date>.¹>

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...to <XX>% off the annual <target net><gross> ...unt will begin to be charged the full advisory fee ...nt to you at the conclusion of the offer. To unenroll ...r is subject to change or cancellation without ...lying investment option expenses charged at the ...our account. These are the standard expenses ...e information, including a detailed fee schedule, ...y be subject to certain short-term trading fees. ...n.>

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Touch 3: Reminder

Provides a reminder of the new service

Links to the PP&A landing page and includes the Workplace Planning phone number

Sent 30 days after launch

Subject line: Reminder: Get help staying on target for retirement.
Preheader: See if Fidelity® Personalized Planning & Advice is right for you.

view in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

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

Secure Login

Retirement is personal. Let's make sure your plan is, too.

Plan for a retirement that's all yours. With **Fidelity® Personalized Planning & Advice,** we'll create an investment strategy for your retirement savings. One that takes into account your personal situation, goals for the future, and comfort level with risk.

No matter how complex your life is or how uncertain the markets become, you'll have the confidence of knowing an experienced team is working to help keep you on the right track for retirement.

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Learn more

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Destination Pages

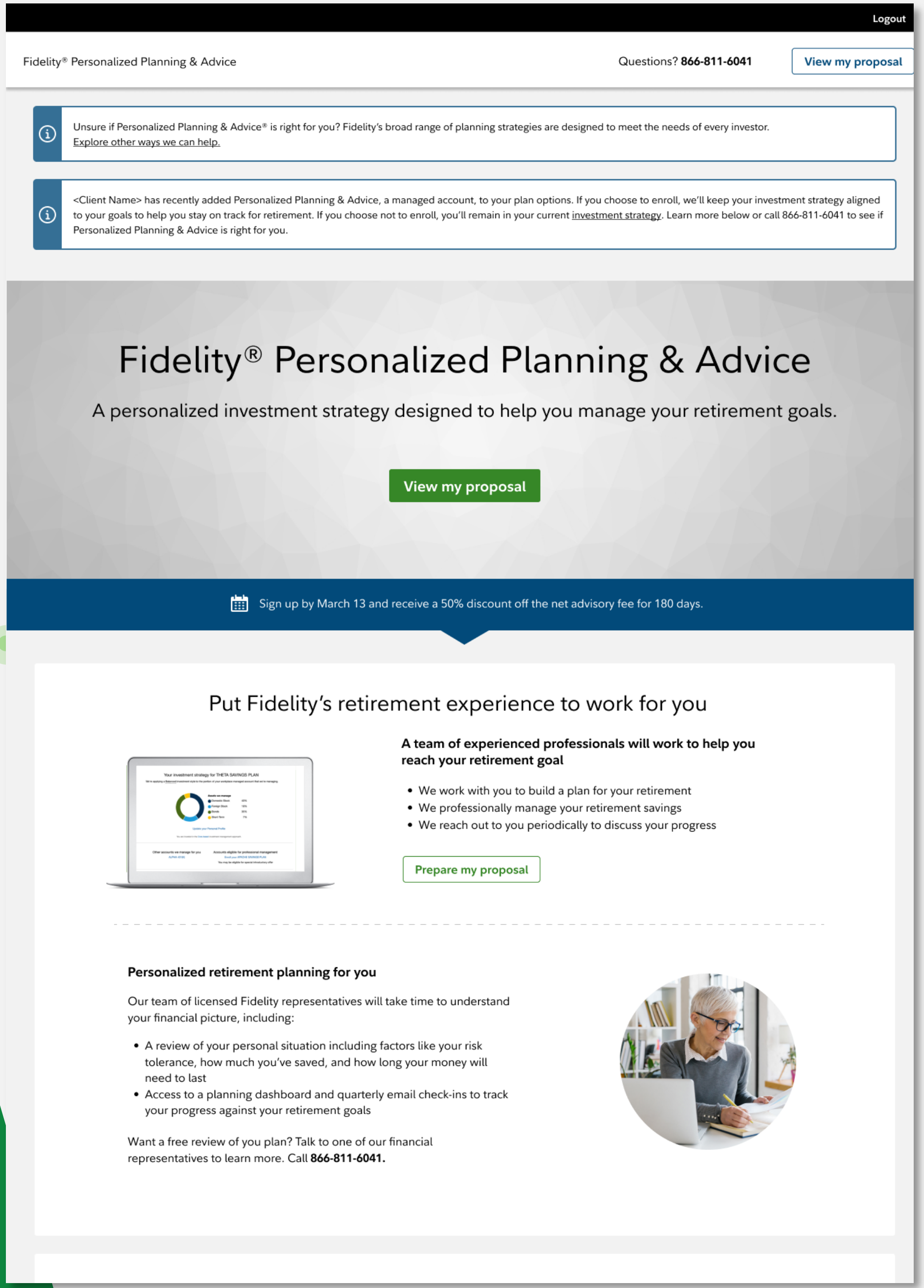
PP&A landing page

Destination of the Launch & Reminder Announcement

Allows participants to learn more about the PP&A service

Incentive message included, if your plan is offers one

Alert at the top of the page informs participants that other strategies are also available



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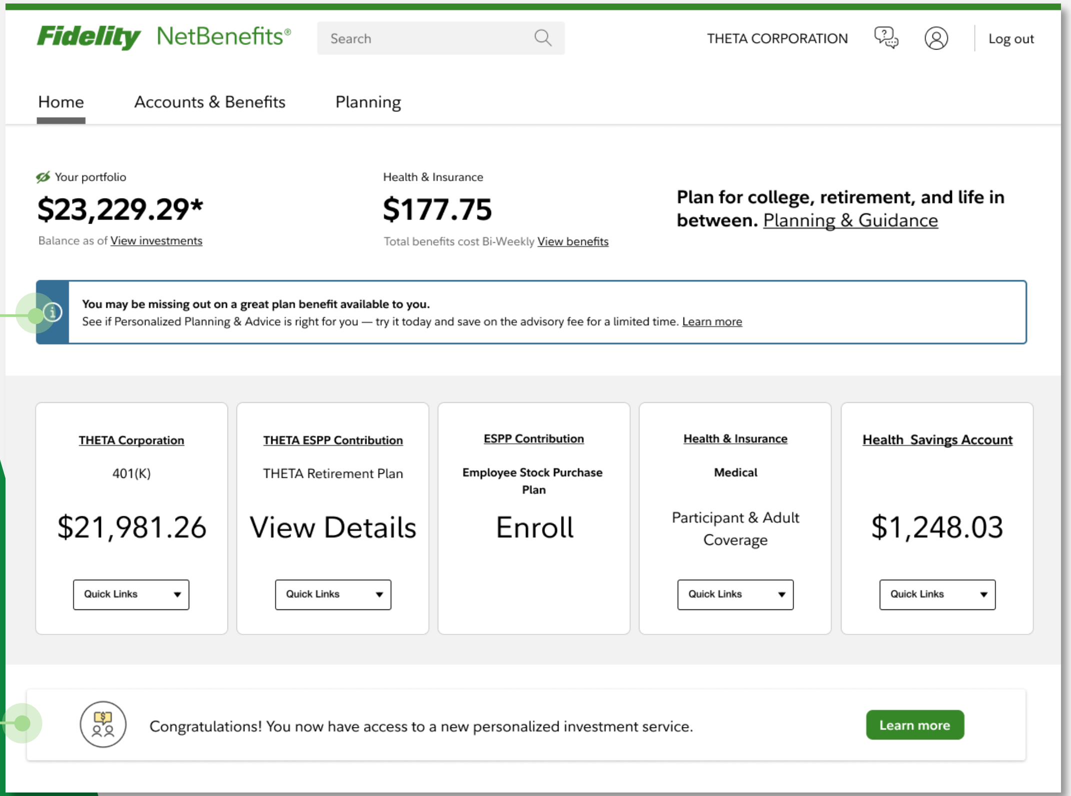
Complementary NetBenefits® Experience

NetBenefits® homepage messaging

Alert raises awareness of the PP&A incentive, if your plan is offering one

Bricklet message raises awareness of PP&A as a newly added service



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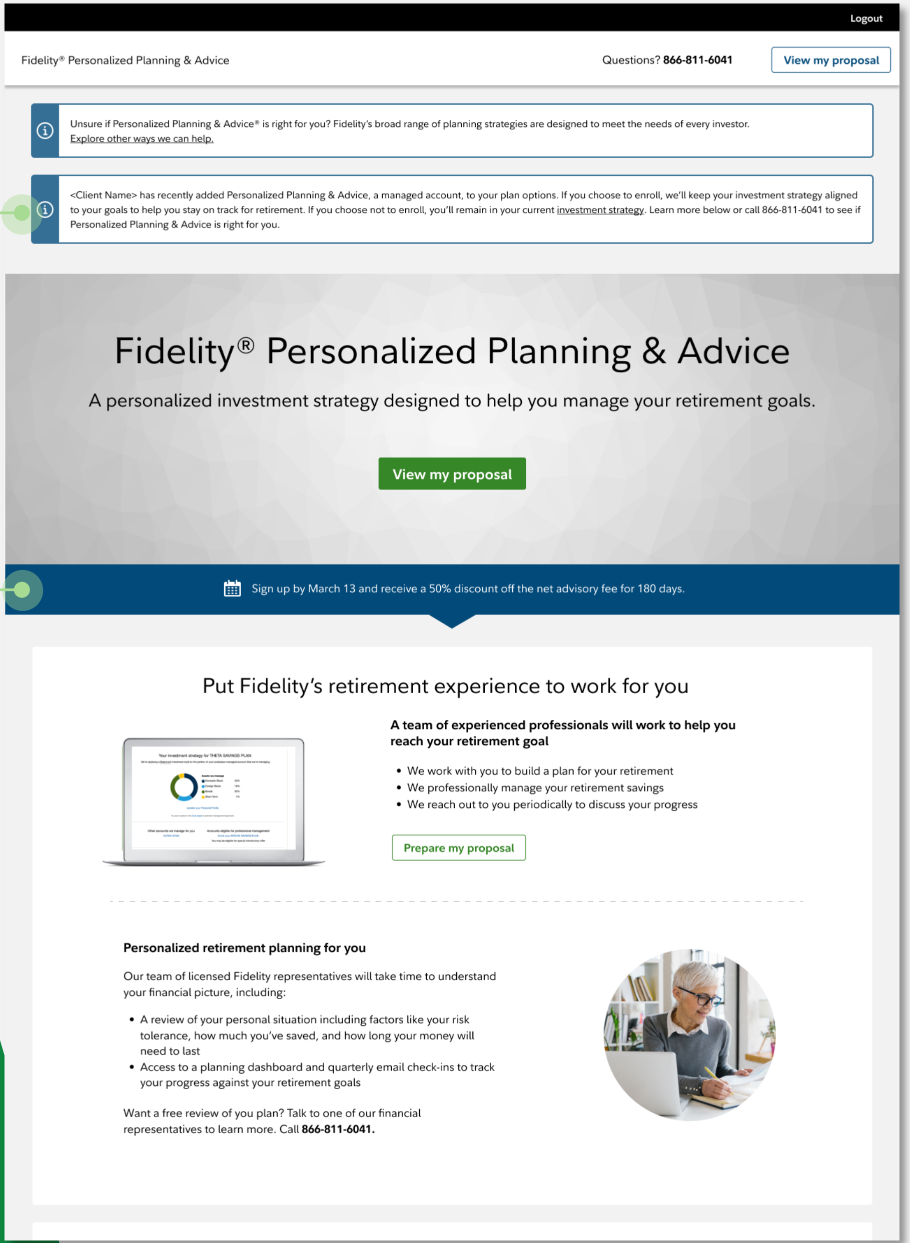
NetBenefits®
PP&A landing page

Alert raises awareness of PP&A as a newly added service

Incentive messaging included, if your plan is offering one



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Appendix: Emails with Disclosures

Touch 1

Change Notice

Subject line: COMING SOON: Personalized help to manage your retirement goals

Preheader: Your employer is adding more to your workplace benefits.

view in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE 200x75 max

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

Secure Login

Feel more secure in your retirement plan

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- Take into account your personal situation and overall financial picture
- Balance risk and reward based on your comfort level
- Align to your goals to help you stay on track for retirement

Strategic Advisers LLC, a registered investment advisor and Fidelity Investments company, has been appointed to provide discretionary management through Fidelity® Personalized Planning & Advice.

For an advisory fee of no more than .85% of your assets,[1] we'll partner with you to manage your hard eard-earned savings, so you can work toward your retirement goals.

Look for more details coming your way soon.

Questions? Call 866-811-6041

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[1]The annual gross advisory fee will be no more than .85% of your average managed account balance. However, your net advisory fee will vary over time depending on the investments in your account and other factors. The advisory fee for your account does not include underlying investment option expenses charged at the individual investment option level for any investment options in your account. These are the standard expenses that all investment option shareholders pay. Starting on **<mm/dd/yyyy>**, you may obtain additional advisory-fee information, including a detailed fee schedule, by login in to NetBenefits.comor by call 866811-6041. Shareholders may be subject to certain short-term trading fees. Please consult the individual fund prospectus for more information.

You may unenroll by calling a Representative. There are no cancellation fees.

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Touch 2

Launch Announcement

Subject line: Now Available: Fidelity Personalized Planning & Advice

Preheader: We'll help you get on track for retirement.

view in your browser

Fidelity INVESTMENTS

WI CLIENT LOGO SPACE
200x75 max

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

Secure Login

Get a personalized retirement investment strategy

Investing for your retirement isn't easy. But no matter what stage you're at, or how complex your situation, Fidelity has a range of resources and benefits to help you feel more secure for your today and tomorrow.

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<[1] Special offer: You will receive an advisory fee discount equal to <XX>% off the annual <target net><gross> advisory fee for <XXX> days. At the end of the period, your account will begin to be charged the full advisory fee applicable to your plan. No additional communications will be sent to you at the conclusion of the offer. To unenroll in this service at any time, call Fidelity at 866-811-6041. This offer is subject to change or cancellation without notice. The advisory fee for your account does not include underlying investment option expenses charged at the individual investment option level for any investment options in your account. These are the standard expenses that all investment option shareholders pay. For more advisory fee information, including a detailed fee schedule, log in to NetBenefits.com or call 866-811-6041. Shareholders may be subject to certain short-term trading fees. Please consult the individual fund prospectus for more information.>

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Touch 3

Reminder

Subject line: Reminder: Get help staying on target for retirement.
Preheader: See if Fidelity® Personalized Planning & Advice is right for you.

view in your browser

Fidelity Investments

WI CLIENT LOGO SPACE
200x75 max

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

Secure Login

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