

3<sup>RD</sup> PARTY POINT SOLUTIONS

# Real Estate Agent Referral Service

86% of consumers

used a real estate agent to buy or sell a home <sup>1</sup>

<sup>1</sup> Source: NAR Realtor, 2022.

<sup>2</sup> A reward is not available where prohibited by state law, including Alaska, Iowa, Louisiana and Missouri. A reduced agent commission may be available for sellers in lieu of the reward in Mississippi, New Jersey, Oklahoma, and Oregon and should be discussed with the agent upon enrollment. No reward will be available for buyers in Mississippi, Oklahoma, and Oregon. A commission credit may be available for buyers in lieu of the reward in New Jersey and must be discussed with the agent upon enrollment and included in a Buyer Agency Agreement with Rebate Provision. Rewards in Kansas and Tennessee are required to be delivered by gift card.

HomeStory and Fidelity Investments are independent entities and are not legally affiliated.

Details are as of March 2024 and are subject to change.

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

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Front side can be used as standalone; back side must be accompanied by front side



HOME SERVICES



HomeStory offers access to experienced real estate agents and a bonus up to \$9,500 when employees buy or sell a home through their preferred network



## Why HomeStory?

**HomeStory** is a digital real estate company that matches consumers with real estate agents best-suited for their homebuying needs:

- Experienced, local real estate agents with at least 5 years of experience and 90% satisfaction ratings.
- Preferred network of real estate agents including Berkshire Hathaway Home services, a nationwide network of real estate agents.
- An analytics-driven home discovery where employees can get up to the minute property listings, neighborhood & amenity recommendations and market comparison tools.



## Benefit to Employees

An easy-to-use digital real estate agent referral service for employees looking to buy or sell a home:

- Connecting: Personalized matching to an experienced real estate agent in the employee's local area
- Home Discovery: Access to search for homes through a comprehensive listing of homes throughout the country updated every 15 minutes
- Special Reward for Fidelity Users: HomeStory provides \$350 to \$9,500 for buying or selling a house with a real estate agent in HomeStory's preferred network<sup>2</sup>



## Benefit to Employers

Offer support for employees dealing with the financial and emotional aspect of buying and selling a home:

- Provide support, guidance, and confidence to employees during the complexity of buying or selling a home which may reduce distraction while at work
- Give access to a resource that may help reduce the time and effort spent on shopping for a home
- Help employees save money on a large financial transaction which may help with their financial wellness

# Real Estate Agent Referral Service

## Special Bonus through HomeStory for Fidelity as of March 2024

Home Value	Bonus
\$0-\$99K	\$350
\$100K-\$149K	\$650
\$150K-\$249K	\$900
\$250K-\$349K	\$1,000
\$350K-\$449K	\$1,250
\$450K-\$499K	\$1,750
\$500K- \$549K	\$2,000
\$550K-\$599K	\$2,300
\$600K-\$699K	\$2,400
\$700K- \$799K	\$2,750
\$800K-\$899K	\$3,100
\$900K-\$999K	\$3,500
\$1.0M-\$1.099M	\$4,000
\$1.1M-\$1.199M	\$4,350
\$1.2M-\$1.299M	\$4,750
\$1.3M-\$1.399M	\$5,500
\$1.4M-\$1.499M	\$6,000
\$1.5M+	\$9,500



Executive overview	HomeStory is a digital real estate company that matches consumers with real estate agents best suited for their homebuying needs. They have a preferred network of real estate agents that must meet standards for experience and client satisfaction. Upon buying or selling a home with a HomeStory referred real estate agent, consumers are rewarded with a unique bonus between \$350 and \$9,500 based on the final home sale price.
Data security & privacy	Please refer to HomeStory's privacy policy ( <a href="#">linked here</a> ).  This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3 <sup>rd</sup> party is solely responsible for the information and services it provides.
Employee experience	The Financial Wellness experiences will include a direct link to HomeStory. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.  HomeStory may email, text, or call employees if the employees choose to engage with HomeStory
Data & reporting	Fidelity will not send any personal data to HomeStory. All personal data will be entered by employees directly on HomeStory's site. Fidelity may send HomeStory an anonymized client indicator for each employee that follows a link to HomeStory's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	HomeStory does not charge a service fee for access to their real estate agent referral service or online home search platform. Third-party real estate agents are not affiliated with HomeStory. These third-party real estate agents may charge fees based on the terms of service they reach directly with employees who hire them to buy or sell a home.
Employee bonus	Employees are eligible to get a special reward of \$350 to \$9,500 from HomeStory when they buy or sell a home using a real estate agent in HomeStory's certified network. <sup>2</sup>
Fidelity compensation	Fidelity will not receive compensation from HomeStory.