Retirement Saving & Income

Guide your employees through the transition to Fidelity

Leverage a toolkit that further illustrates what your employees can expect as their plan account moves to Fidelity.

Pre-Transition

As you kick-off implementation of your plan's transition to Fidelity, inform employees about what's to come with:

- A 'Welcome to Fidelity' transition **explainer video** that helps them understand the process.
- A sample **email** to link employees to the video
- A **postcard** that provides a link to the video
- A **poster** that links to the explainer video
- **Digital signage** promoting the explainer video

During Transition

While the transition is ongoing, help employees plan ahead for when it's complete, depending on which approach you select, with:

Scenario A

- A tutorial **video** for plan transition with **asset mapping**
- A sample **email** to link employees to the **video Scenario A**
- **Digital signage** promoting tutorial Scenario A

Scenario B

- A tutorial **video** for plan transition with an **investment window**
- A sample **email** to link employees to the **video Scenario B**
- **Digital signage** promoting tutorial Scenario B

Post-Transition

Once the transition has been fully implemented, let your employees know about onboarding and enrollment in their new plan with:

- A **poster** linking to NetBenefits® App
- **Digital signage** promoting registration
- A **screensaver** promoting registration and beneficiaries
- A One-time **Text Message** on how to register or establish beneficiaries
- A **QR code** to scan that links to NetBenefits mobile app

Questions? Contact your Fidelity representative.

Message and data rates may apply. Get details at http://pages.fidelityinvestments.com/smsee
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