

Subject Line: [FIRST NAME], you took your financial wellness checkup. Now what?
Preheader: Great job taking the checkup! We can show you how to take the next step.

Touch 2 Sample
Advice
Financially Established/
Foundation Builders



JANE SAMPLE
Plan Name

[Secure Login](#)

Let us help you invest for
your future.



Interested in learning about how to **invest more of your money**? That's great - we can help!

Whether you're just getting started or want a refresher, find out what you should know—like what investment style meets your needs or what \$100 could be worth over 50 years—and get started today.

Give us a call to discuss your goals.

800-798-2363



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Investing involves risk, including risk of loss. The value of your investment will fluctuate over time and you may gain or lose money.

Always consider your personal financial situation prior to making any financial decision.

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Subject Line: [FIRST NAME], you took your financial wellness checkup. Now what?
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Touch 2 Sample
Advice
Paycheck to Paycheck

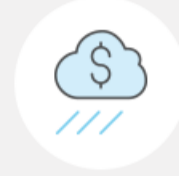


*Goal Booster Point
Solution shown only if
plan has it enabled

JANE SAMPLE
Plan Name

[Secure Login](#)

Let us help you save for
an emergency.



Looks like you are **working on building an emergency fund**. Good plan! Having some extra money on hand can make a big difference when an unexpected challenge arises.

So how much should you save? Even a little—say, \$10 each week—can go a long way toward helping grow your emergency fund.

Ready to dive right in and start saving? **Goal Booster** can help you set, save toward, and track your goals.

Want more help with your financial goals? Call us at 800-798-2363.



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Advice



JANE SAMPLE
Plan Name

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Let us help you create
a budget.



Your financial wellness checkup shows that you're working on **creating a budget**. Nice job! It's great to have a plan that helps you balance your saving and spending.

Whether you're new to budgeting or just want to stay on track, we're here to help so you can feel more confident in the decisions you make.



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*529 Point Solution shown
only if plan has it enabled



JANE SAMPLE
Plan Name

[Secure Login](#)

Let us help you save for college.



Your financial wellness checkup shows that you're **saving for a child's education**. It's a big step—but we're here to help.

Explore what you should know to help prepare—like just how quickly a college fund could grow if you put away just a little each week. Don't wait to get started!

Ready to dive right in and start saving? A **529 account** is a great option to save for education expenses (think: tuition, rent, books and supplies, and more). Find out if a Fidelity Managed 529 College Savings account is right for you.

Want more help with your overall financial goals?

800-798-2363



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