

**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.

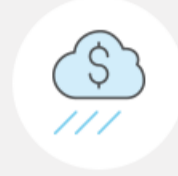
Touch 2 Sample  
Education  
\*Goal Booster Point  
Solution shown only if  
plan has it enabled



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.



Download the free NetBenefits app to manage your accounts whenever—and wherever—you want!



[Learn more](#) about what the app can do for you.

[Privacy Policy](#) | [Terms of Use](#)

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.

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Fidelity cannot guarantee that the information herein is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Consult an attorney or tax professional regarding your specific situation.

The information in this email is intended solely for the attention and use of the named addressee. This message or any part thereof must not be disclosed, copied, distributed, or retained by any person without authorization of the addressee.

Please do not respond to this email. This mailbox is not monitored, and you will not receive a response.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

The Fidelity Investments and pyramid design logo and NetBenefits are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

© 2023 FMR LLC. All rights reserved.

976882.4.0

**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  
Education



JANE SAMPLE  
Plan Name

[Secure Login](#)

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.



Download the free NetBenefits app to manage your accounts whenever—and wherever—you want!



[Learn more](#) about what the app can do for you.

[Privacy Policy](#) | [Terms of Use](#)

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.

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Fidelity cannot guarantee that the information herein is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Consult an attorney or tax professional regarding your specific situation.

The information in this email is intended solely for the attention and use of the named addressee. This message or any part thereof must not be disclosed, copied, distributed, or retained by any person without authorization of the addressee.

Please do not respond to this email. This mailbox is not monitored, and you will not receive a response.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

The Fidelity Investments and pyramid design logo and NetBenefits are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

© 2023 FMR LLC. All rights reserved.

976882.4.0

**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  
Education  
\*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.



Download the free NetBenefits app to manage your accounts whenever—and wherever—you want!



[Learn more](#) about what the app can do for you.

[Privacy Policy](#) | [Terms of Use](#)

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.

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Fidelity cannot guarantee that the information herein is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Consult an attorney or tax professional regarding your specific situation.

The information in this email is intended solely for the attention and use of the named addressee. This message or any part thereof must not be disclosed, copied, distributed, or retained by any person without authorization of the addressee.

Please do not respond to this email. This mailbox is not monitored, and you will not receive a response.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

The Fidelity Investments and pyramid design logo and NetBenefits are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

© 2023 FMR LLC. All rights reserved.

976882.4.0

**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.



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.



Download the free NetBenefits app to manage your accounts whenever—and wherever—you want!



[Learn more](#) about what the app can do for you.

[Privacy Policy](#) | [Terms of Use](#)

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.

Fidelity does not provide legal or tax advice. The information herein is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and subject to change, which can materially impact investment results. Fidelity cannot guarantee that the information herein is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information. Consult an attorney or tax professional regarding your specific situation.

The information in this email is intended solely for the attention and use of the named addressee. This message or any part thereof must not be disclosed, copied, distributed, or retained by any person without authorization of the addressee.

Please do not respond to this email. This mailbox is not monitored, and you will not receive a response.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

The Fidelity Investments and pyramid design logo and NetBenefits are registered service marks of FMR LLC.

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](#), 900 Salem Street, Smithfield, RI 02917

© 2023 FMR LLC. All rights reserved.

976882.4.0