

Managed Retirement Funds participant experience

OWNER: **Fidelity/Recordkeeper** Plan Sponsor

AWARENESS

30 Days

Teaser Announcements



Email

Regulatory Notification¹

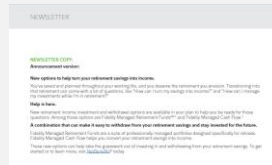


Fund addition communication

ENGAGEMENT

Post-Launch

Broad Engagement

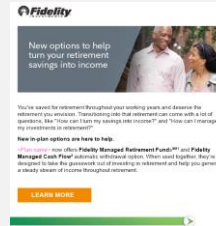


Newsletter Content



Digital Signage

Targeted Engagement



Participant Email



NetBenefits engager²

Digital Experience



Landing Zone



Overview Flyer—Printable



Overview Video



FAQs—Printable

Live Participant Support via Phone or Chat

These Toolkit resources are available on the [Fidelity PSW Library](#)

Illustrative—for discussion purposes only.

¹ Must occur 30 days prior to conversion date. All participants.

² New NetBenefits engagers available to strategic, select, large and TEM plans.

¹ For plan sponsor and institutional use only.



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