

Fidelity Mortgage Referral Program

Save Time and Money in Your Mortgage Search

Enjoy personal support. Competitive rates, and a \$1,399 credit through Fidelity's mortgage program with Leader Bank.

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Home

[Fidelity Lending Solutions](#)

Lending Solutions – Mortgage Referral Program



Why Fidelity Mortgage Referral Program

A mortgage through Leader Bank can make home financing easier for employees through:

- Ability to quickly receive a real time no-commitment rate quote
- Purchase Pass program strengthens offers with a fully underwritten pre-approval subject only to the review of a future property
- Competitive interest rates to lower monthly payments
- Digital application designed to streamline the mortgage process



Benefit to Employees

Value

- Keep your costs low with a **\$1,399 credit** toward the loan origination fee and competitive interest rates relative to other mortgage lenders in the market.

Dedicated service

- Experienced Leader Bank loan officers are dedicated exclusively to support Fidelity clients throughout the process.

Simple and convenient experience

- Experience a simple digital quote and application process.



Benefit to Employers

Our mortgage offering is designed to help save our customers time and money in the mortgage process.

- Many borrowers do not shop for mortgage rates with multiple lenders. Those who do compare rates from multiple lenders reduce their mortgage rate by .10% on average¹.
- Customers can comparison shop, speak with our loan officers, get pre-approvals, and submit digital applications
- Program can support customer's home purchases, refinances, and Home Equity Lines of Credit

1. Source: (Feb. 16, 2023) Freddie Mac Research: [When Rates Are Higher, Borrowers Who Shop Around Save More - Freddie Mac](#)



Fidelity Mortgage Referral Program

Shopping for the right mortgage shouldn't be hard. Now there's an easy way for you to purchase or refinance your next home, vacation property, or investment property, all as part of your relationship with Fidelity. With a mortgage offered by Leader Bank—a well-established lender with a strong track record—you can get added value, service, and convenience in your home-buying process.

Executive overview

Leader Bank is equipped to deliver a personalized and supportive experience for Fidelity clients—and we're proud to work with a bank that prioritizes customer service and satisfaction above all else.

Data security & privacy

Please refer to Fidelity Mortgages privacy policy.

Employee experience

The Financial Wellness experiences will include a direct link to Fidelity Mortgage Referral Program. 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.

Data & reporting

Fidelity and Leader Bank may share data as part of the mortgage application process. Please refer to any program specific documents and disclosures provided.

Cost to employees

No cost, a \$1,399 credit toward the loan origination fee will be credited upon closing.

Fidelity compensation

The parent company of Fidelity Brokerage Services LLC has a 30% non-controlling ownership interest in Leader Bank. Because of this relationship, this referral may provide Fidelity Investments a financial or other benefit.