FIDELITY POINT SOLUTIONS

Fidelity Estate Planner

46%

of Americans **don't have a will***

LEGAL ASSISTANCE

https://www.fidelity.com/estateplanner

Fidelity Estate Planner® is an interactive on-line experience designed to make it easier for your employees to create or update their estate plan.

Why Fidelity?

Fidelity Estate Planner can help make estate planning easier to understand by simplifying the process for employees regardless of their family situation. It integrates an educational tool with curated resources to make it easier to take action.

- Fidelity's Attorney Access Network: Curated list of Estate Planning attorneys throughout the U.S.
- FidSafe: Secure, easy, free document storage from Fidelity to store, access and share digital copies of your family's most important documents
- Fidelity's account aggregation tool enables you to view all of your assets in one place

Benefit to Employees

Fidelity Estate Planner is uniquely designed to digitally guide employees through the estate planning process. Employees get:

- **Informed:** Clear and simplified education
- **Organized:** Comprehensive Estate Planning Summary that can be used to guide attorney discussions
- **Connected:** Easily identify an attorney through direct access to Fidelity's Attorney Access Network; Access or find resources for working with their estate planning attorney
- **Next Steps:** Guidance on estate plan impact to their financial accounts

Benefit to Employers

Fidelity Estate Planner is available to the employer and employee at no cost. It can help employees ensure that they have the legal documents in place to protect their wishes and their family.

- Comprehensive digitally guided support wrapped into one experience for broad based employee appeal
- Helps employees get educated, organized, and confident in moving forward with appropriate legal support by providing them access to a digitally guided experience

*Gallup, June 2021

The information that Participants input into this Service, and the educational outputs that are provided to Participants, are not a substitute for formal estate planning with an attorney and in no way create valid and/or legal estate planning documents. The goal of this Service is to provide users with an organized way of consolidating information necessary to create an estate plan. The creation of requisite legal documents and the implementation of an estate plan is a separate process. The information and content contained in this Service is not a substitute for the advice of an attorney.

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Fidelity INVESTMENTS