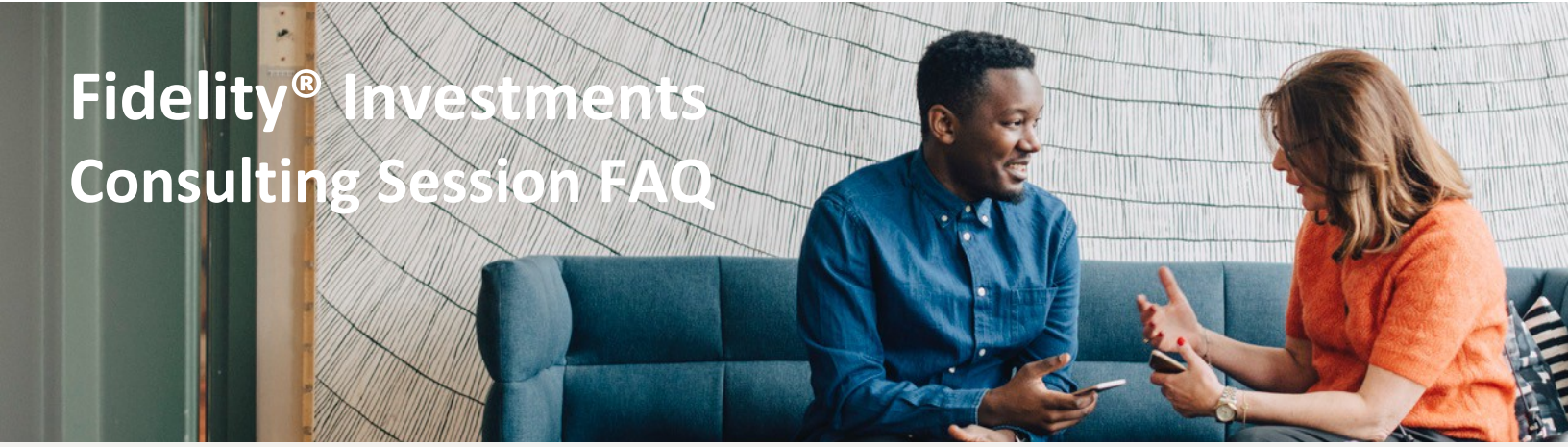
Fidelity® Investments Consulting Session FAQ



WHO IS FIDELITY? Privately held for more than 70 years, Fidelity employs more than 40,000 associates who are focused on the long-term success of our customers. With assets under administration of $11.8 trillion, including managed assets of $4.5 trillion as of December 31, 2021, we focus on meeting the unique needs of a diverse set of customers: helping more than 32 million people invest their own life savings, 22,000 businesses manage employee benefit programs, as well as providing more than 13,500 financial advisory firms with investment and technology solutions to invest their own clients' money. For more information about Fidelity Investments, visit https://www.fidelity.com/about.

WHAT TYPE OF HELP CAN FIDELITY PROVIDE? Your consultation with a Fidelity representative is driven by your needs and can include benefits education and support, retirement planning, portfolio help for your retirement plan assets and more. During your consultation, a Fidelity representative will help you develop a detailed plan to align with your goals and personal situation. Additional support by referral is available for comprehensive wealth planning through investment strategies, income protection, asset protection, and family conversations, for example.

IS THERE A COST FOR THE SERVICE? No. This service is a complimentary benefit for eligible employees of your company.

WHO IS ELIGIBLE FOR A CONSULTATION? One-on-one virtual planning sessions are ideal for employees approaching retirement, to help them establish a plan, or discuss specific questions. However, anyone can attend!

CAN MY SPOUSE/PARTNER ATTEND? Yes. Your spouse or other family members are invited to participate with you.

WHAT SHOULD I BRING? Have statements for your retirement and savings accounts, brokerage accounts, IRAs, any mutual funds, and other bank accounts available.

HOW LONG IS EACH SESSION? On average each session last about 45 minutes. In some cases, 30-minute sessions may be available.

WHAT ARE THE QUALIFICATIONS OF THE FIDELITY REPRESENTATIVE? Your onsite Fidelity associate is required to have a 4-year college degree and a CRPC or CFP® designation.

HOW DO I SIGN UP FOR A CONSULTATION? You have the option to have a consultation over the phone with a Fidelity representative or by visiting your local Fidelity Investor Center. Call your plan's 800# to determine the best solution to meet your personal needs.

WHAT STEPS SHOULD I TAKE AFTER MY CONSULTATION? It's very important to stay on top of your retirement and investment plan and review it on an annual basis. The quickest way to review your plan is to call and speak with a Fidelity representative at 1-888-832-2093. They can help update your plan and review it with you over the phone.

WILL THE INFORMATION I SHARE BE KEPT CONFIDENTIAL? Yes. Fidelity has policies in place to protect our clients' privacy. For details visit https://www.fidelity.com/privacy-policy.

Investing involves risk, including risk of loss.

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