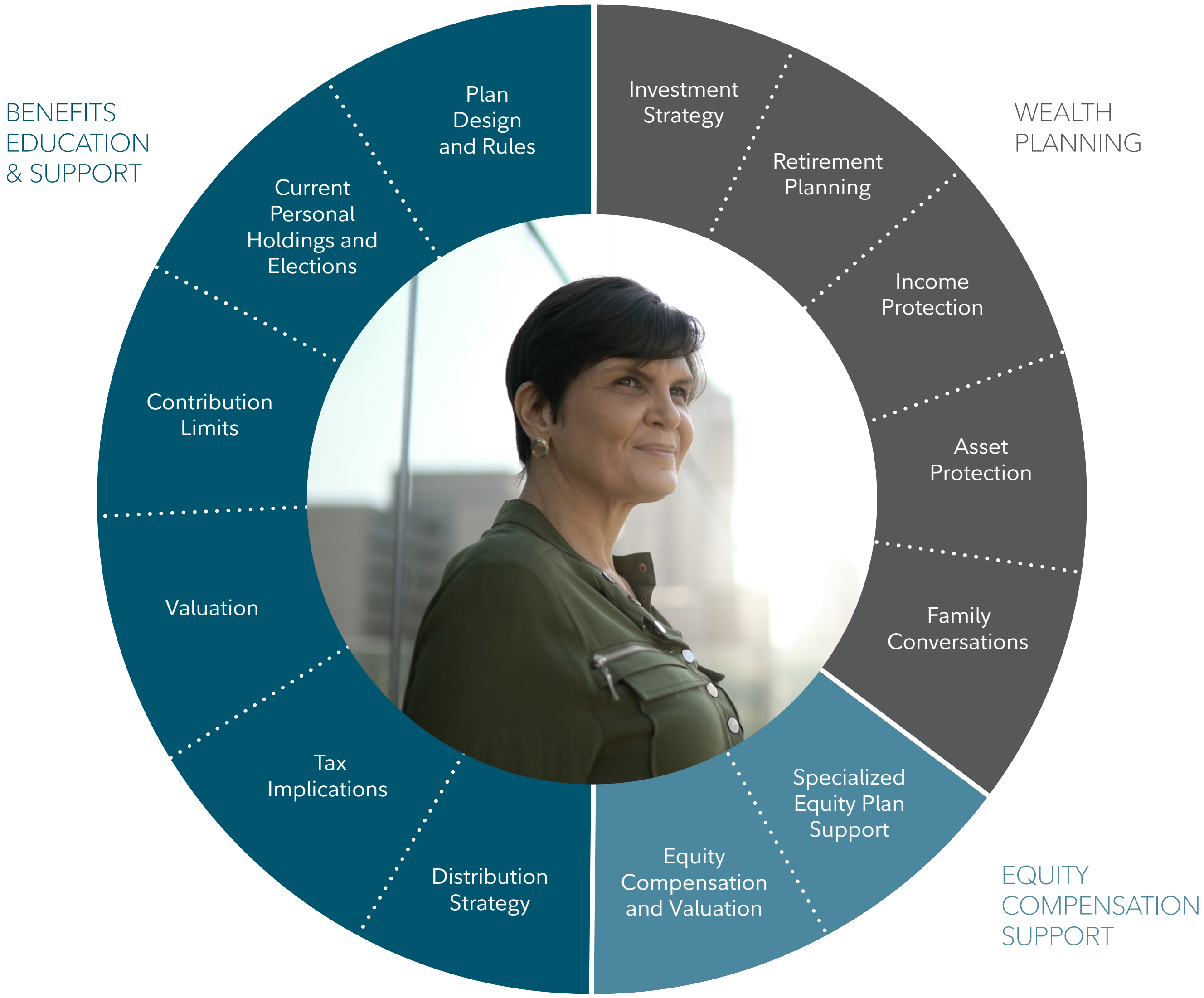
A deeper level of support for your important financial decisions

Your dedicated team can work with you to develop a plan that integrates your workplace benefits decisions with broader wealth planning strategies to help you achieve your financial goals.



CALL 800.533.8004 today to schedule a meeting with your dedicated team.

BENEFITS EDUCATION & SUPPORT

Plan Design and Rules
- Materials that highlight key benefit features
- Ongoing benefits education

Current Personal Holdings and Elections
- One-on-one sessions with your dedicated planning consultant
- Summary and assessment of current participation across all plans

Contribution Limits
- Company match
- Contribution timing

Valuation
- Current and estimated future value of holdings
- Valuation of equities and options

Tax Implications
- Pre- and post-tax contributions
- Tax-advantaged distributions

Distribution Strategy
- Required distribution events
- Distribution timing

WEALTH PLANNING

Investment Strategy
- Asset allocation
- Tax-efficient investing
- Taxable savings strategy

Retirement Planning
- Savings strategy
- Income strategy
- Personal (taxable, IRA, annuity)
- Workplace investments
- Benefits and Social Security
- Health care and long-term care

Income Protection
- Disability
- Premature death protection
- Outliving income

Asset Protection
- Estate planning
- Wills
- Trusts
- Wealth transfer
- Charitable giving

Family Conversations
- Education
- Living expenses for children and parents
- Assisting parents and relatives

EQUITY COMPENSATION SUPPORT

Equity Compensation and Valuation
- Valuation of equities and options
- Equity compensation analysis

Specialized Equity Plan Support*
- Complex trading strategies
- Facilitating share and money movement
- Block trading, Form 144 filing, preclearance

Fidelity INVESTMENTS

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