

Global Financial Wellness

Insights leading to better outcomes

Fidelity's global approach to financial wellness empowers employees to gain knowledge and take action to improve outcomes, while providing employers with the insights they need to make informed decisions on strategy and employee engagement.

Global events over the last few years have reinforced the need for employers to consider a globally-consistent financial wellness program to help support and educate their workforce internationally.

Fidelity's research* illustrates a significant proportion of employees globally do not feel on track to meet their financial goals. Many are living paycheck to paycheck, regardless of industry or location. They are increasingly looking to their employers for support to help improve their financial situation.

Fidelity's customizable** global financial wellness solution covers several key areas

with a mixture of globally-consistent elements, and individual (and optional local) relevance, across multiple languages



Employee Engagement
including communications and live webinars



Employee Assessment
with scores and recommendations, and linkage to client resources



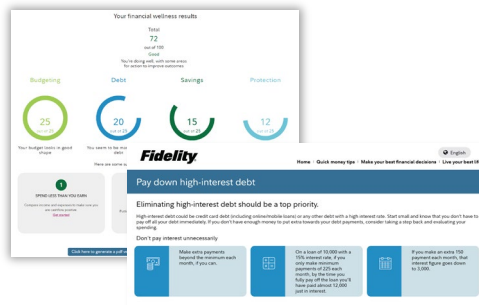
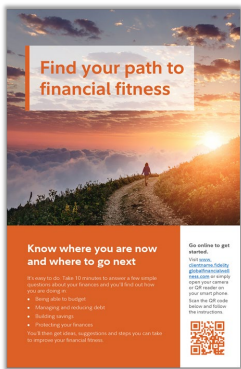
Education and Resources
including interactive tools and pre-recorded webinars, and linkage to client resources



Data Analytics and Insights
including analysis by demographics and location



Strategy and Communications
based on quarterly insights, including annual strategy review



Screenshots for illustrative purposes only

Key advantages of Fidelity's global solution

Global approach

Consistent framework and financial education for all employees globally

Powerful insights

Data analytics across your global workforce, on an anonymous basis

Simple and affordable

Simple, quick implementation for standard solution, with flat pricing**

To learn more, please contact your Fidelity consulting representative or Managing Director.

*Source: Fidelity Global Financial Wellness Survey, 2020

**Flat pricing for standard global solution regardless of number of countries/employees and can be provided upon request. Optional customization can be scoped/priced upon request

For plan sponsor use only.

© 2021 - 2022 FMR LLC. All rights reserved.

992783.2.0

