

Thrive: Financial Wellness Series



Approach

- Build around women's needs & preferences
- Inspire with modular educational content
- Create an inviting, collaborative environment

Three new workshops

- 1 Get Organized
- 2 Build & Own Your Plan
- 3 Retirement Income Planning "On Your Own"

Attendees will learn:

- Why financial wellness is especially important for women
- Budgeting, saving & managing debt
- Investing strategies
- How to build a retirement income plan



Get Organized

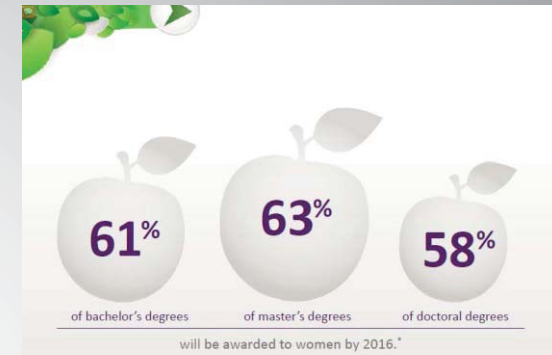


Objectives:

In this session, attendees will learn about:

- Why financial wellness is so important
- Essentials to build a budget
- Balance savings and debt priorities
- Plan for other goals

Women have many priorities to manage, getting organized and taking control of finances can be a smart way to find balance and feel confident.



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Build & Own Your Plan



Objectives:

In this session, attendees will learn about:

- Women's planning & savings strengths
- Investing basics
- Defining their investing personality
- Staying on track

This session focuses on turning savers into investors by building an understanding of investment categories, determining their investing personality, and finding the right investment mix for their goals.



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Retirement Income Planning “On Your Own”



Objectives:

In this session, we'll help attendees:

- Realize the importance of planning on their own
- Decide when they may be able to retire
- Estimate how long their money may last
- Prepare for challenges they might face in retirement

This session will help attendees understand the financial and personal risks they may face and how to put a plan in place to prepare them for living in retirement.





IMPORTANT ADDITIONAL INFORMATION

Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

As with all your investments through Fidelity, you must make your own determination as to whether an investment in any particular security or securities is consistent with your investment objectives, risk tolerance, financial situation, and your evaluation of the security. Fidelity is not recommending or endorsing any investment by making it available to its customers.

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