Learning with Fidelity

Education that can help build financial know-how

We help employees build their financial knowledge and skills—from how to use their workplace benefits in support of their goals, to saving for, planning for, and transitioning to retirement. Led by Fidelity financial professionals, our education includes everything from strategies, to real-life scenarios, hands-on resources, and next steps to help employees build confidence in making decisions about their money.

Live webinars with Fidelity

- Over 300 learning events each year on money management, saving, investing, protection, and retirement planning.
- Employees choose the topics and dates/times that work for them.
- Questions answered in real time and access to helpful tools.

View webinar calendar

Employer sponsored events

- Exclusive live webinars or onsite sessions focused on the unique financial goals and challenges of your workforce.
- Highlight your specific benefit details.
- Hear what's top of mind for your workforce with live Q&A.

Talk with your Fidelity representative

On-demand videos

- Self-directed learning that helps participants build financial knowledge and skills relevant to their goals.
- Clear next steps connect learning to doing.
- Many available in both English and Spanish.

Explore videos



What's available

Benefits enrollment & use 2

Money management & life events 4

Saving & investing 6

Protection 7

Retirement saving, planning & transitioning 8

Onboarding to Fidelity & corporate transitions 10

Specialty learning events 11

Ask Fidelity 12

Learning with Fidelity

Benefits enrollment & use

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Explore How Guaranteed Income Can Help in Retirement[1,2,3,4] • 60 min. • Review the basics of retirement income planning • Understand how an income annuity[5] can help cover an income gap • Learn how the Guaranteed Income Direct benefit can turn your workplace savings into retirement income for life (or as long as you need it)		✓	
Exploring the Benefits of an HSA[6] • 60 min. • Understand the benefits of an HDHP/HSA • See how they work together • Explore the features of the HSA		✓	✓ ENGLISH PLAN-SPECIFIC**
Get Started and Save for the Future You* • 60 min. • Understand your retirement plan • Learn the steps to enroll in your plan • See if you're saving enough • Learn ways to save more	✓	✓	✓ ENGLISH SPANISH PLAN-SPECIFIC**
NEW SECURE Act 2.0: Roth Catch-Up Provision • 30 min. • Learn about IRS limits on workplace savings plan contributions • Know the difference between pre-tax and Roth • Understand how the SECURE 2.0 Act may affect you		✓	✓ PLAN-SPECIFIC**
Understand Plan Loans • 20 min. • Understand if a plan loan or withdrawal is right for you • Recognize the importance of an emergency savings account • Know how to keep retirement goals on track			✓ ENGLISH
Understanding Roth Contributions in Your Workplace Savings Plan[7] • 30 min. • Learn about different tax-advantaged ways you can contribute to your workplace savings plan • Understand how those contribution types can affect your paycheck and your taxes • Know the difference between a Roth IRA and the Roth option in your workplace savings plan		✓	
Understanding Your Nonqualified Deferred Compensation (NQDC) Plan(s) • 60 min. • Event based topic • Understand the potential benefits of your nonqualified deferred compensation plan • Learn the factors you should consider before participating in the plan		✓	✓ ENGLISH PLAN-SPECIFIC**

*Topic available in Spanish for employer sponsored events
**Speak with your Fidelity representative to learn more and request a plan-specific video

Learning with Fidelity

Benefits enrollment & use

	Live webinars with Fidelity	Employer sponsored events	On demand videos
What is a Roth In-Plan Conversion?[7] • 30 min. • Your retirement plan offers many ways to save for the future • Learn more about your savings options • Explore how to convert after-tax dollars to a Roth using an in-plan conversion		✓	
NEW Your Student Debt Retirement Benefit[8] • 30 min. • Understand importance of contributing to a workplace savings plan • Learn how your benefits can help you save for retirement while paying down student loan debt • Take your next steps for enrollment		✓	✓ ENGLISH

Learning with Fidelity

Money management & life events

	Live webinars with Fidelity	Employer sponsored events	On demand videos
NEW A Path to Financial Wellness • 30 min. • Understand the 4 pillars of financial wellness • Learn practical ways to balance spending, saving, and debt • Build confidence in managing today's needs and tomorrow's goals	✓	✓	✓ ENGLISH
A Woman's Guide to Building a Financial Plan[9] • 60 min. • Start reducing your debt with four clear steps • Organize your budget and identify how much you may need for retirement • Confidently design a financial plan to help meet your unique goals	✓	✓	✓ ENGLISH
Build an Emergency Savings Fund • 10 min. • Identify how much you should save • Find the money to contribute to this fund • Set up your own emergency saving fund			✓ ENGLISH
Create a Budget • 10 min. • Recognize how creating a budget can help you take control of your financial situation • Identify core components of a sound budget • Create your own budget			✓ ENGLISH
Create a Budget and Build Emergency Savings • 30 min. • Learn about different components of a budget • See how emergency savings are a critical part of your budget	✓	✓	
Get a Handle on Your Current Student Loan Debt • 60 min. • Understand a wide range of student loan repayment options • Use Fidelity's student debt resources and tools to evaluate your current loan situation and determine next steps for tackling your student debt	✓	✓	
NEW Set Goals and Save for What You Want* • 30 min. • Understand the importance of goal setting • Learn how to prioritize and manage multiple savings goals • Get tips to help save for some specific goals	✓	✓	✓ ENGLISH SPANISH

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Learning with Fidelity

Money management & life events

	Live webinars with Fidelity	Employer sponsored events	On demand videos
NEW Strategies That Can Help You Manage Your Money* • 60 min. • Understand 3 components of a sound budget • Build (or rebuild) your emergency savings fund • Learn strategies to prioritize and manage debt	✓	✓	✓ ENGLISH
Tackle Debt and Understand Your Credit Score • 30 min. • Discover different strategies for paying down debt • Learn how to better understand credit scores • Take better control of finances	✓	✓	
Take Control of Your Debt • 15 min. • Identify guidelines when it comes to taking on debt • Use one of two strategies for tackling debt • Understand your credit score and why it's so important			✓ ENGLISH

*Topic available in Spanish for employer sponsored events

Learning with Fidelity

Saving & investing

	Live webinars with Fidelity	Employer sponsored events	On demand videos
A Woman's Guide to Investing Beyond Retirement[9] • 60 min. • Create short-term and long-term savings goals • Choose an investment approach based on your personal preferences • Establish a plan to help protect your assets	✓	✓	✓ ENGLISH
Fidelity Personalized Planning & Advice[10] • 60 min. • Learn to manage your own portfolio • Explore Fidelity's professional investment management • Understand the benefits, fees, and expenses		✓	✓ ENGLISH
Investing for Beginners • 30 min. • Understand basic investing terms and concepts • Learn about the building blocks of investing • Determine what type of investor to be	✓	✓	
Navigating Market Volatility* • 60 min. • Learn the history of market conditions • Understand the importance of having a plan • Recognize the pitfalls potentially faced by investors	✓	✓	✓ ENGLISH SPANISH
Preserving Your Savings for Future Generations[7] • 60 min. • Understand what assets are potentially taxable and how they might be distributed • Learn the importance of a living will and health care proxy • Review the basics of trusts, gifting, and possible insurance replacement strategies	✓	✓	✓ ENGLISH
Quarterly Market Update[11] • 60 min. • Review current macro- and microeconomic conditions • Explore U.S. equity, international equity, and fixed income markets • Consider long-term investing themes	✓	✓	
Saving for College • 60 min. • Review the current cost of college • Learn different ways to fund education • Understand planning considerations	✓	✓	✓ ENGLISH

*Topic available in Spanish for employer sponsored events

Learning with Fidelity

Protection

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Cyber Fraud & Personal Security Insights • 60 min. • Learn strategies to help you ensure the safety and security of your home, wealth, and family	✓	✓	
CyberWellness®: Personal Security Checklist • 60 min. • Learn about practical recommendations to help protect your accounts, identity, devices, and data	✓	✓	
NEW Spot the Scam: Know the Signs • 60 min. • Recognize common financial scams • Identify scam warning signs • Review practical resources for protection	✓	✓	

Learning with Fidelity

Retirement saving, planning, & transitioning

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Fundamentals of Retirement Income Planning • 60 min. • Learn the benefits of a retirement income plan • Identify retirement income sources and expenses • Explore different retirement income strategies	✓	✓	✓ ENGLISH
Health Care in Retirement • 60 min. • Estimate potential health care expenses in retirement • Learn about coverage options before and after Medicare eligibility • Create a plan that fits health care into your retirement budget	✓	✓	✓ ENGLISH
NEW Help Boost Your Retirement Savings* • 60 min. • Understand the five key risks of retirement • Learn how much you may need for the future • Strategize on how to save more	✓	✓	
NEW How to Begin Investing for Retirement* • 60 min. • Explore some key investing concepts and common asset classes • Help understand the importance of asset allocation and diversification • Learn about investment approaches for your workplace savings plan	✓	✓	✓ ENGLISH SPANISH PLAN SPECIFIC**
Learn the Basics of When and How to Claim Social Security* • 60 min. • Understand Social Security • Considerations for claiming Social Security benefits • Decide when to take Social Security benefits	✓	✓	✓ ENGLISH SPANISH
Maximize Social Security in Your Retirement Strategy • 60 min. • Learn how Social Security fits your retirement paycheck • Identify Social Security claiming strategies • Create your retirement income plan		✓	✓ ENGLISH
Medicare Basics: Planning and Enrollment[12] • 60 min. • Understand different types of Medicare coverage and how they work • Learn key considerations to balance cost and coverage options • Review enrollment timelines and tips to avoid penalties		✓	✓ ENGLISH

*Topic available in Spanish for employer sponsored events
**Speak with your Fidelity representative to learn more and request a plan-specific video

Learning with Fidelity

Retirement saving, planning, & transitioning

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Retirement Basics • 30 min. • Learn how important it is to save for the future • See the power of saving small amounts over time • Learn about other vehicles such as IRAs, HSAs, and brokerage accounts	✓	✓	
Retirement Income Planning for Her[9] • 60 min. • Understand why retirement planning is different for women • Identify the five key financial risks in retirement • Learn the basics of creating a retirement income plan	✓	✓	✓ ENGLISH

Learning with Fidelity

Onboarding to Fidelity & corporate transitions

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Get Ready for the Move to Fidelity* • 60 min. • Understand what's happening to your workplace savings plan • Know what happens to your money during the move • Feel confident about what steps you need to take now and once your plan is at Fidelity		✓	✓ ENGLISH SPANISH PLAN SPECIFIC**
Get to Know Fidelity and Next Steps to Take Now* • 60 min. • Know what the move to Fidelity means for you • Understand any changes to your plan • Take next steps to get started with your new Fidelity account		✓	✓ ENGLISH SPANISH PLAN SPECIFIC**
Take Your Next Steps During Your Transition • 60 min. • Understand the workplace benefits to which you may be entitled • Consider the types of insurance coverage you may want to maintain • Know the various distribution options available for your workplace savings plan		✓	✓ ENGLISH SPANISH

*Topic available in Spanish for employer sponsored events
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Learning with Fidelity

Specialty learning events

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Women Talk Money • 45 min. • Live monthly webinars, open to all, with opportunities to learn from Fidelity pros, plus special marquee events with inspiring guest speakers • Real talk about the money, investing, and career decisions that help shape your life, paired with practical guidance you can apply right away • Stream on-demand replays at any time	✓		✓
Women Talk Money @Work[13,14] • 45 min. • Live and on-demand programming that is customized to align with your employees' interests, priorities, and retirement plan benefits • Topics range from saving and paying down debt to preparing for life in retirement • Live panels feature leaders from your organization and Fidelity in candid conversation to help drive financial well-being while providing clear, actionable next steps		✓	✓
Fidelity Viewpoints®: Market Sense[13,14] • 20 min. • A weekly webinar and podcast with insights into the latest market events and answers to common investing questions. • Live every Tuesday at 2 p.m. ET	✓		

Learning with Fidelity

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Creating the Retirement You Want[9] • 30 min. • Whether you're planning as a couple or on your own, it's important for women to plan for higher retirement expenses (especially health care costs) and be strategic about when to claim Social Security.		✓	
Discover the Potential of Your Health Savings Account[6] • 30 min. • Understand the benefits of saving and investing money in a Health Savings Account to help you prepare for medical expenses now and in retirement.		✓	
Estate Plans Can Help Protect What Matters Most[7] • 30 min. • If you haven't created an estate plan yet, you'll be surprised how many topics it covers. Learn five steps to consider when preparing to meet with your estate planning professional.		✓	
How Consolidating Accounts Could Help You Save Time and Money • 30 min. • Learn how consolidating your retirement accounts could help simplify your financial life		✓	
How to Plan for the Income You'll Need in Retirement • 30 min. • How do your financial resources turn into income in retirement? It starts with a plan. Learn how to create a retirement income plan and explore the risks that can impact it.		✓	
Making Your Money Work as Hard as You Do[9] • 30 min. • See what options are available and what you need to know to get started with investing.		✓	
Navigating Market Volatility • 30 min. • Learn about the importance of having a plan and staying the course, investing best practices, and common pitfalls to avoid during volatile markets. The goal is for you to establish a plan if you don't have one, feel comfortable with your plan, and know where to get help.		✓	

Learning with Fidelity

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

	Live webinars with Fidelity	Employer sponsored events	On demand videos
Planning for Health Care Costs and Coverage in Retirement • 30 min. • Health care costs in retirement can affect your savings and lifestyle. Explore how to prepare for the reality of health care costs in retirement.		✓	
Put the Power of NetBenefits to Work for You • 30 min. • Did you know that there's more to do in NetBenefits than checking your balance? Come on a tour and discover the powerful resources that can help you plan, track, and save for retirement.		✓	
Resetting Your Financial Foundation[9] • 30 min. • Whether it's prioritizing expenses and debt or saving for the future, it's important to review your saving and spending to get clarity on where your money is going		✓	
Setting Goals and Habits That Stick[9] • 30 min. • You can start by identifying or revisiting what you want your money to achieve and setting up good habits to create lasting change.		✓	
The Tax (and Personal) Benefits of Charitable Giving[7] • 30 min. • Many people contribute cash to their favorite charities, but there are additional options to consider. Learn more about other tax-effective ways to give.		✓	
Top Things to Do Before You Retire • 30 min. • Wish you had a to do list to help you prepare for retirement? Learn how to get your financial house in order and other important considerations that can impact your decisions.		✓	
Understanding the Basics of Social Security • 30 min. • Social Security may be an important income source for retirement. Learn about key Social Security claiming ages and how your benefit is calculated, so you can better understand the choices.		✓	

Important information

1. Only available for plans who have the Guaranteed Income Direct solution offered in their plan.

2. Fixed annuities available through Guaranteed Income Direct are issued by third-party insurance companies, which are not affiliated with any Fidelity Investments company. A contract's financial guarantees are solely the responsibility of and are subject to the claims-paying ability of the issuing insurance company.

3. Income annuities available as plan distribution options are selected by the plan's fiduciaries and sold and issued by third-party insurance companies which are not affiliated with any Fidelity Investments company. Fidelity Health Insurance Services, LLC ("FHIS") may receive a fee from the issuing insurance company; however, FHIS does not directly or indirectly solicit, negotiate, or sell any annuities available as plan distribution options. A contract's financial guarantees are solely the responsibility of and are subject to the claims paying ability of the issuing insurance company.

4. Fidelity Health Insurance Services, LLC.

5. In order to provide an income stream, there is no or limited access to assets.

6. Only available for HSA plans administered by Fidelity.

7. Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

8. Only available in plans that have the SDR point solution enabled

9. Women's Investing Topic

10. Fidelity® Personalized Planning & Advice at Work is a service of Strategic Advisers LLC, a registered investment adviser and a Fidelity Investments company, and may be referred to as "Fidelity," "we," or "our" within. For more information, refer to the Terms and Conditions of the Program. When used herein, Fidelity Personalized Planning & Advice refers exclusively to Fidelity Personalized Planning & Advice at Work. **This service provides advisory services for a fee.**

11. Only available during the second month of each quarter.

12. Available only in plans that have the FMS point solution enabled

13. Only available to clients who have permissions in place to promote retail products and services.

14. Fidelity retail products and services are offered separately from your employer-sponsored retirement plan.

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

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