

Fidelity Investor Centers

Local, face-to-face guidance to help address comprehensive financial needs.



What's Included

Specialized investment planning capabilities

- For employees seeking a more comprehensive approach to planning¹
- Suite of services:
 - Investment strategy
 - Retirement income planning
 - Income and asset protection
 - Family assistance

Nationwide network

- More than 180 centers
- Licensed professionals available by appointment

Key Benefits

Assistance with unique and complex needs

- A consultative approach to addressing complex financial needs
- Representatives leverage online planning programs and educational seminars to build and manage individual plans
- Dedicated relationship support for long-term planning¹

Investor Center products and services are offered beyond those of your employer-sponsored retirement plan.

¹ Minimum in investable assets is required.

² National Client Experience Index Score, Q2 2014.

92% of customers are satisfied with the guidance provided by Investor Center representatives²

