

▶ Fidelity: innovative, industry-leading retirement provider

- ▶ **America's No. 1 provider of 401(k) retirement savings plans and a leading provider of 403(b) plans for non-profits**
- ▶ **Serves nearly 19,000 defined benefit and contribution pension plans with over 20 million participants and administered assets of \$816 billion**
- ▶ **Industry leader in IRAs with \$540 billion in assets**
- ▶ **One of the world's largest financial services firms, with more than \$3.0 trillion in administered assets and more than 24 million customers nationwide**

Fidelity leads innovation of lifecycle funds with Freedom Funds that re-allocate assets over time aimed at a target retirement date (86% of Fidelity 401(k) plans use a lifecycle fund)*

Fidelity provides extensive enrollment education, online tools, and 24/7 customer service that help workers make good investment choices with diversified asset allocation

*Source: Building Futures VIII, November 2007