

# Point Solution Detailed Fact Sheets



# College Test Preparation



ACT offers support to employees and their children on their journey preparing for college with key ACT college planning resources.



## Why ACT?

**ACT** provides leading college and career readiness solutions. They help students with support for college including test prep courses and tools to aid student performance

- They are grounded in 60 years of research
- Creator of the ACT test which assesses mastery of college readiness standards among high school students
- A variety of test prep solutions available including live online instruction, self-paced or the official ACT test guidebook, and ACT Academy™ a free online learning tool and test practice program designed to boost test performance



## Benefit to Employees

Employees with high school-aged children looking for extra help in preparing for ACT college tests, might benefit from:

- Convenient access to low-priced comprehensive ACT test preparation services including:
  - Free online practice tools & programs including access to the best-selling guidebook "Official ACT Prep Guide"
  - Official ACT Prep Pack and ACT Academy
- Special access through Fidelity to a collection of key college planning resources and information



## Benefit to Employers

Provides support for employees with children or family members planning for college or secondary education:

- Give employees peace of mind that their child is prepared for their biggest college-related tests
- Alleviates the household stress of preparing for test day, which can often take weeks or months of preparation
- Helps parents avoid taking their child's college-related stress to the workplace

52%

of 2019 graduates took ACT test during high school\*

\*Source: ACT.org website

ACT and Fidelity Investments are independent entities and are not legally affiliated.

Details are as of June 2020 and are subject to change.

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# College Test Preparation


<https://www.act.org>

Executive overview	ACT is a mission-driven, nonprofit organization dedicated to helping people achieve education and workplace success. Grounded in 60 years of research, ACT is a trusted leader in college and career readiness solutions.
Data security & privacy	<p>Please refer to ACT's privacy policy (<a href="#">linked here</a>).</p> <p>This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.</p>
Employee experience	<p>The Financial Wellness NetBenefits experience will include a direct link to ACT. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness ServiceOverview.</p> <p>ACT may email, text, or call employees if the employees choose to engage with ACT.</p>
Data & reporting	Fidelity will not send any personal data to ACT. All personal data will be entered by employees directly on ACT's site. Fidelity may send ACT an anonymized client indicator for each employee that follows a link to ACT's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	ACT.org offers a special collection of key resources and information for Fidelity. Through a custom landing page for Fidelity, employees can purchase key resources applicable to ACT tests and college admissions process including guidebooks, ACT Prep Packs as well as access to the ACT Academy as a freeservice.
Fidelity compensation	Fidelity will not receive any compensation from ACT.

# Legal Assistance: Find an Attorney

57%

of consumers search  
online for an attorney\*

\* 2019 Legal Trends Report(Clio)  
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<https://www.avvo.com>



LEGAL  
ASSISTANCE

Avvo makes it easier for your employees needing legal support to find an attorney using their online attorney directory.



## Why Avvo?

**Avvo** is an online marketplace that provides easy access to specialized attorneys through an online directory. Through Fidelity, they are one option to help employees find and evaluate an attorney to help them through various life events and legal situations.

- Easy access to up-to-date detailed information and profiles on attorneys in all 50 states
- Access to independent reviews as well as attorney ratings to help employees evaluate and choose who they want to work with for their situation
- Information on legal topics to help address common employee legal questions



## Benefit to Employees

For employees needing legal advice, the Avvo online attorney directory is one option to make it easier to find the right local attorney for their particular situation.

- No cost to employee to use online directory
- Saves employee time by searching directories of attorneys in their local area
- Access to independent reviews and Avvo's ratings on each attorney
- Provides a resource on a variety of legal topics and situations as well as the ability to "ask a lawyer" specific legal questions through their online site



## Benefit to Employers

Provides easy access for employees who might be looking for an attorney to help through different legal situations.

- Reduces employees' barriers to finding an attorney that meets their needs
- Provides access across the country for broad employee populations
- No cost to employees

# Legal Assistance: Find an Attorney



## Executive overview

Avvo is an online marketplace for legal services that provides an online directory of attorneys in all 50 states. It also provides access to a database of legal information consisting primarily of previously answered questions. Their attorney profiles may include client reviews, disciplinary actions, peer endorsements, and attorney-submitted legal guides. Avvo is owned by Internet Brands.

## Data security & privacy

Please refer to Avvo privacy policy ([linked here](#)).

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## Employee experience

The Financial Wellness experience will include a direct link to Avvo. These links will prompt users with a leaving site message before directing them to Avvo. For more information on how we link to third parties, please see the Financial Wellness Service Overview.

## Data & reporting

Fidelity will not send any personal data to Avvo. All personal data will be entered by employees directly on Avvo's website. Fidelity may send Avvo an anonymized client indicator for each employee that follows a link to Avvo's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.

## Cost to employees

Avvo does not charge a service fee for access to their online directory of attorneys. Third-party attorneys are not affiliated with Avvo. These third-party attorneys will charge fees based on the terms of service they reach directly with employees who hire them.

## Fidelity compensation

Fidelity will not receive compensation from Avvo.

# College Admissions Counseling

38  
minutes

The average amount of college guidance per student in public schools\*

\*Impact Of College Coach On Your Workforce - Horizons Workforce Consulting Survey (n=1300)  
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Collegewise offers your employees personal support with expert college counselors throughout the college admission process – all at a special value.



## Why Collegewise?

**Collegewise** provides access to expert college counselors to help students and their families choose, apply, and improve their chance of acceptance to the right college.

- 95% of Collegewise students get into one of their top three college choices – 4x higher than average admissions rates
- More than 8,000 families and 24,000 students have trusted them for college admissions counseling
- More than 65 professional college counselors
- Range of programs including customized programs designed around the student's situation



## Benefit to Employees

A resource for employees with 8th grade through 12th grade children looking for personal support to best navigate college planning & admission process.

- Matching of students to the counselor that will provide the best expertise for their individual situation
- Counselors managing the process to ease the demands of the parent
- Through Fidelity an exclusive offer:
  - 10% off comprehensive admissions packages and essay package
  - Access to exclusive & relevant webinars
  - Customized education for relevant grade



## Benefit to Employers

Provides support for employees with children or family members planning for college or secondary education

- Reduce employee stress and productivity loss associated with one of the biggest moments in their family lives – getting their child into the right college
- 86% said college planning services reduced the stress of managing work/life balance

# College Admissions Counseling



<https://www.collegewise.com>

Executive overview	Founded in 1999, Collegewise is the nation's largest college counseling organization. Collegewise looks to change the way that families approach the college admissions process.
Data security & privacy	<p>Please refer to Collegewise's privacy policy (<a href="#">linked here</a>).</p> <p>This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.</p>
Employee experience	<p>The Financial Wellness experience will include a direct link to Collegewise. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.</p> <p>Collegewise may email, text, or call employees if the employees choose to engage with Collegewise.</p>
Data & reporting	Fidelity will not send any personal data to Collegewise. All personal data will be entered by employees directly on Collegewise's site. Fidelity may send Collegewise an anonymized client indicator for each employee that follows a link to Collegewise's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	Through Fidelity, employees will receive a 10% discount on all Collegewise programs with the exception of 'Pay As You Go (Hourly)' Services. Costs of the Collegewise programs are not set costs and will vary depending on the needs of the student and the counselor to which they are matched to best meet those needs. Variations in cost can depend on, but are not limited to, the amount of time spent with the counselor, services provided, location and experience level of the counselor.
Fidelity compensation	Fidelity will not receive any compensation from Collegewise.

# Fidelity Estate Planner

50%+

of Americans **don't**  
have a will\*



<https://www.fidelity.com/estateplanner>



LEGAL  
ASSISTANCE

Fidelity Estate Planner® is an interactive on-line experience designed to make it easier for your employees to create or update their estate plan.



## Why Fidelity?

**Fidelity Estate Planner** can help make estate planning easier to understand by simplifying the process for employees regardless of their family situation. It integrates an educational tool with curated resources to make it easier to take action.

- Fidelity's Attorney Access Network: Curated list of Estate Planning attorneys throughout the U.S.
- LegalZoom: One option to create critical affordable estate planning legal documents online along with the added benefit of a 20% discount for Fidelity customers. See page 2 for more information.
- FidSafe: Secure, easy, free document storage from Fidelity to store, access and share digital copies of your family's most important documents



## Benefit to Employees

Fidelity Estate Planner is uniquely designed to digitally guide employees through the estate planning process. Employees get:

- **Informed:** Clear and simplified education
- **Organized:** Comprehensive Estate Planning Summary that can be used to guide attorney discussions
- **Connected:** Easily identify an attorney through direct access to Fidelity's Attorney Access Network; Access to 20% off LegalZoom online estate planning services; and resources to use for finding and working with an estate planning attorney
- **Next Steps:** Guidance on estate plan impact to their financial accounts



## Benefit to Employers

Fidelity Estate Planner is available to the employer and employee at no cost. It can help employees ensure that they have the legal documents in place to protect their wishes and their family.

- Comprehensive digitally guided support wrapped into one experience for broad based employee appeal
- Helps employees get educated, organized, and confident in moving forward with appropriate legal support by providing them access to a digitally guided experience



# Fidelity Estate Planner



## LegalZoom Overview

Executive overview	LegalZoom is one of the nation's leading provider of personalized, online legal solutions and legal documents for families and small businesses. It provides affordable solutions to help consumers create the appropriate legal documentation online. It was founded in 2001 and has served over 4 million customers.
Data security & privacy	Please refer to LegalZoom's privacy policy ( <a href="#">linked here</a> ). This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3 <sup>rd</sup> party is solely responsible for the information and services it provides.
Employee experience	The Financial Wellness experiences will include a direct link to LegalZoom. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview. LegalZoom may email, text, or call employees if the employees chooses to engage with LegalZoom
Data & reporting	Fidelity will not send any personal data to LegalZoom. All personal data will be entered by employees directly on LegalZoom's site. Fidelity may send LegalZoom an anonymized client indicator for each employee that follows a link to LegalZoom's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	Employees will receive 20% off online legal products, including the estate planning bundle or individual estate planning products at LegalZoom if they utilize the link from NetBenefits.
Fidelity compensation	Fidelity will not receive compensation from LegalZoom.

The Fidelity Estate Planner is not an attorney referral service. When applicable, participating attorneys, or their respective law firms, have not paid a fee or compensation to be included or listed in the Fidelity Estate Planner, nor does Fidelity receive any fee or compensation for providing the law firm and attorney contact information to its customers.

Fidelity does not recommend or endorse any law firm or attorney listed in the Fidelity Estate Planner. Fidelity is not assessing your legal needs or providing legal advice in the Fidelity Estate Planner. There is no requirement that you select any of the law firms or attorneys in the list. You are free to select any law firm or attorney of your choice. The Fidelity Estate Planner is educational in nature and is not intended to serve as the primary basis of your estate and/or tax planning decisions.

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# Tax Preparation Services



TAX  
PREPARATION



<https://www.hrblock.com>

H&R Block makes it easier and more affordable for your employees to prepare and file their tax returns – at a special discount.



## Why H&R Block?

**H&R Block** provides affordable do-it-yourself and assisted tax preparation services. Through Fidelity, they are one option to help employees with preparing their tax return.

- One of the leaders in the tax preparation industry with over 65 years in business
- Easy and simplified online experience
- Available for federal returns and all states that require state returns
- A suite of tax preparation products available at different price points to meet employees varying complexity needs (from simple for free file to complex such as real estate investment or small business ownership)



## Benefit to Employees

Employees can use H&R Block as one option to prepare their tax returns along with the added benefits of:

- Through Fidelity, special discounts of up to \$20 off tax preparation products
- Access to H&R Block Online Assist for on-demand help from a CPA or Enrolled Agent
- Easily import W-2s by taking pictures on your phone to upload
- Access to free edition of H&R Block including free forms for students and families depending on tax filing complexity



## Benefit to Employers

Provides employees with access to tax preparation services.

- No cost to employer
- Access to competitive discounts on H&R Block tax preparation with Fidelity's negotiated rates
- Provides employees access to on-demand help from CPAs and Enrolled Agents with certain tax product purchases
- Appeals to broad employee base to drive employee satisfaction and retention

89%

of tax returns are filed electronically\*

H&R Block and Fidelity Investments are independent entities and are not legally affiliated.

\*IRS 2018 statistics <https://www.irs.gov/newsroom/filing-season-statistics-for-week-ending-may-11-2018>

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# Tax Preparation Services



Executive overview	H&R Block is a leader in the tax preparation services industry and provides easy access to assist in filing federal and state tax returns online. They have been providing tax preparation services for 65 years.
Data security & privacy	<p>Please refer to H&amp;R Block's privacy policy <a href="#">(linked here)</a>.</p> <p>This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.</p>
Employee experience	<p>The Financial Wellness experience will include a direct link to H&amp;R Block. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.</p> <p>H&amp;R Block may email, text, or call participants if they choose to engage with H&amp;R Block.</p>
Data & reporting	Fidelity will not send any personal data to H&R Block. All personal data will be entered by employees directly on H&R Block's site. Fidelity may send H&R Block an anonymized client indicator for each participant that follows a link to H&R Block's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	Employees will receive up to \$20 off tax preparation services at H&R Block if they utilize the link from NetBenefits.
Fidelity compensation	Fidelity will not receive compensation from H&R Block.

# College Test Preparation

2.2M

students in class of 2019  
took the SAT\*

\*[www.collegeboard.org](http://www.collegeboard.org)

Kaplan and Fidelity Investments are independent entities and are not legally affiliated.

Details are as of June 2020 and are subject to change.

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Kaplan offers College Test Preparation services led by a team of teachers and backed by a higher score guarantee – at a lower price for employees



## Why Kaplan?

**Kaplan** provides leading educational solutions across multiple industries and topics. They help students prepare for the SAT or ACT college prep tests by focusing on key concepts and score-boosting strategies.

- One of the world's largest and most diverse education providers
- Has helped more than 1 million students
- Early leader in online education as well as a leader in instructional innovation
- Programs available online, in-person and offered as either self-paced or teacher led
- 9 out of 10 Kaplan students get into one or more of their top-choice schools



## Benefit to Employees

Employees with high school-aged children looking for extra help in preparing for the SAT or ACT college tests could benefit from:

- Engaging classes either online or in-person; teacher led or self-paced
- Teachers available to answer questions during the classes or 1-on-1
- In-person classes available nationally
- [Kaplan's higher score guarantee](#)
- A special discount through Fidelity: \$100 off the teacher-led and \$50 off the self-paced preparation classes



## Benefit to Employers

Provides support for employees with children or family members planning for college or secondary education:

- Helps employees better ensure that their child is prepared for their biggest college-related test
- May help alleviate the household stress of preparing for test day, which can often take weeks or months of preparation

# College Test Preparation



<https://www.kaplan.com>

## Executive overview

Kaplan is a for-profit corporation that provides educational services to colleges and universities and corporations and businesses, including higher education programs, professional training and certifications, test preparation and student support services. Providing services for over 80 years. Operates in over 30 countries and delivers online courses in over 100 countries. Kaplan, Inc. has been part of Graham Holdings, formerly The Washington Post Company, for more than 30 years and has become its largest subsidiary.

## Data security & privacy

Please refer to Kaplan's privacy policy ([linked here](#)).

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## Employee experience

The Financial Wellness experience will include a direct link to Kaplan. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.

Kaplan may email, text, or call employees if the employees chooses to engage with Kaplan.

## Data & reporting

Fidelity will not send any personal data to Kaplan. All personal data will be entered by employees directly on Kaplan's site. Fidelity may send Kaplan an anonymized client indicator for each employee that follows a link to Kaplan's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.

## Cost to employees

Kaplan has various programs available that employees can choose based on what best meets their needs. Through Fidelity, they will receive a discount of \$100 off the teacher-led classes for a discounted cost of \$499 and \$50 off the self-paced prep at a discounted cost of \$249.

## Fidelity compensation

Fidelity will not receive compensation from Kaplan.

# Legal Assistance: Online Legal Solutions

50%+

of Americans **don't**  
have a will\*

LegalZoom and Fidelity Investments are independent entities and are not legally affiliated.

\*Forbes, January 2018

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<https://www.legalzoom.com>



## Why LegalZoom?

**LegalZoom** provides affordable online legal solutions to make it easier for employees to create the appropriate legal documents online. Through Fidelity, they are one option to help employees with online legal documents such as estate planning legal documents:

- One of the nation's leading provider of personalized, online legal solutions
- Easy and simplified online experience
- Competitively priced
- Provide additional services such as access to legal consultations from independent attorneys to complement online services
- Available in all 50 states



## Benefit to Employees

Employees can use LegalZoom as one option to create critical affordable legal documents online such as estate planning and simple trust documents along with the added benefits of:

- Special discounts such as 20% off LegalZoom estate planning products
- Access to 30 minute phone consultations with independent attorneys on a variety of legal topics (purchase required)
- Dedicated phone support specifically for Fidelity users
- [LegalZoom's 100% satisfaction guarantee](#)



## Benefit to Employers

Provides support for employees looking to create online legal documents so that they are better prepared in time of need:

- Reduces the barrier for employees to get appropriate legal documents by providing an easy to use online solution at a discounted low cost
- Provides access to low cost legal assistance through independent attorney consultations (purchase required)



LEGAL  
ASSISTANCE

LegalZoom makes it easier and more affordable for your employees to create many critical legal documents online.

# Legal Assistance: Online Legal Solutions



Executive overview	LegalZoom is one of the nation's leading provider of personalized, online legal solutions and legal documents for families and small businesses. It provides affordable solutions to help consumers create the appropriate legal documentation online. It was founded in 2001 and has served over 4 million customers.
Data security & privacy	<p>Please refer to LegalZoom's privacy policy (<a href="#">linked here</a>).</p> <p>This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.</p>
Employee experience	<p>The Financial Wellness experiences will include a direct link to LegalZoom. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.</p> <p>LegalZoom may email, text, or call employees if the employees chooses to engage with LegalZoom.</p>
Data & reporting	Fidelity will not send any personal data to LegalZoom. All personal data will be entered by employees directly on LegalZoom's site. Fidelity may send LegalZoom an anonymized client indicator for each employee that follows a link to LegalZoom's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	Employees will receive 20% off online legal products, including the estate planning bundle or individual estate planning products at LegalZoom if they utilize the link from NetBenefits.
Fidelity compensation	Fidelity will not receive compensation from LegalZoom.

# Mortgages: Purchases & Refinancing

\$40K

the average \$ saved by mortgage  
comparison shopping<sup>1</sup>



<https://www.lendingtree.com>



Mortgages

LendingTree offers access to new mortgages and refinancing services that can make financing a home easier for your employees.



## Why LendingTree?

**LendingTree's** online marketplace lets employees determine if taking out a new mortgage or refinancing an existing one is a fit.

- They can compare offers across multiple lenders and select an offer that best fits their objectives
- Through Fidelity, they get access to a curated marketplace of best-in-class lenders and receive personalized offers from up to 5 lenders to maximize choice and enable comparison shopping
- Exclusive online experience through Fidelity where they will only talk to the lenders they want to engage with



## Benefit to Employees

An online mortgage marketplace through LendingTree can make home financing easier for employees through:

- Ability to comparison shop from a curated list of lenders for Fidelity users in one place chosen from the best lenders in LendingTree's large network of lenders.
- Competitive rates from up to 5 lenders with no impact to their credit score.
- Locking in a lower interest rate and lowering monthly payments
- Taking advantage of flexible payment options through a variety of loan types



## Benefit to Employers

Provides support for employees dealing with the financial and emotional aspect of owning a home.

- Provides support, guidance, and confidence to employees during one of the largest financial transactions in their life
- Covers a wide range of employee income and credit levels to help a broader range of borrowers than working with an individual lender
- Provides another tool for helping employees reduce debt and save money

1. Source: LendingTree 2019  
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# Mortgages: Purchases & Refinancing



Executive overview	LendingTree is an online marketplace that allows borrowers to receive loan offers from multiple lenders for various financial borrowing needs including home loans, auto loans, small business loans, personal loans, credit cards, and more. They also offer comparison shopping services for autos and educational programs. Founded in 1996.
Data security & privacy	<p>Please refer to LendingTree's privacy policy (<a href="#">linked here</a>).</p> <p>This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.</p>
Employee experience	<p>The Financial Wellness experience will include a direct link to LendingTree. When a user clicks on the link they will be prompted by a leaving site message and then they will be brought to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.</p> <p>After answering a few questions, users can receive up to 5 offers of credit from multiple lenders. LendingTree may email, text, or call employees who received prequalified rates in order to reengage and guide employees through the mortgage process. Note that getting prequalified rates will not impact employees credit score. Through LendingTree's exclusive experience for Fidelity users, employees will only be contacted by the lenders that they personally select to receive Mortgage offers from. A LendingTree Concierge may reach out to employees to provide assistance if they don't select a lender.</p>
Data & reporting	Fidelity will not send any personal data to LendingTree. All personal data will be entered by employees directly on LendingTree's site. Fidelity may send LendingTree an anonymized client indicator for each employee that follows a link to LendingTree's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.
Cost to employees	LendingTree does not charge a service fee for access to their platform of lenders.
Fidelity compensation	Fidelity will not receive compensation from LendingTree.

# Tax Preparation Services

89%

of tax returns are filed electronically\*



TAX  
PREPARATION

TurboTax makes it easier and more affordable for your employees to prepare and file their tax returns –at a special discount



## Why TurboTax?

**TurboTax** provides affordable do-it-yourself and assisted tax preparation services. Through Fidelity, they are one option to help employees with preparing and filing their tax return.

- Leader in the tax software industry, handling 28% of all returns processed by the IRS in Tax Year 2018
- Easy and simplified online experience
- Available for federal returns and all states that require state returns
- A suite of tax preparation products available at different price points to meet employees varying complexity needs (from simple for free file to complex such as real estate investment or small business ownership)



## Benefit to Employees

Employees can use TurboTax as one option to prepare their tax returns along with the added benefits of:

- Through Fidelity, best-in-class discounts of up to \$25 off TurboTax federal products
- Access to TurboTax Live products for year-round, unlimited tax advice from CPAs and Enrolled Agents
- Easily import W-2s by taking pictures on your phone to upload
- [TurboTax's maximum refund guarantee](#)
- Access to free edition of TurboTax for simple returns



## Benefit to Employers

Provides employees with access to tax preparation services.

- Best-in-class discounts on TurboTax (up to \$25 off federal products), courtesy of Fidelity's negotiated rates
- Appeals to broad employee base to drive employee satisfaction and retention
- No cost to employer

TurboTax and Fidelity Investments are independent entities and are not legally affiliated.

\*IRS 2018 statistics: <https://www.irs.gov/newsroom/filing-season-statistics-for-week-ending-may-11-2018>

Details are as of June 2020 and are subject to change.

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Approved for use in Advisor and 401(k) markets. Firm review may apply.

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# Tax Preparation Service



## Executive overview

TurboTax, owned by Intuit, is a leader in the tax preparation services industry and provides easy access for consumers to help them in preparing and filing federal and state tax returns online. They have been providing tax preparation assistance since the mid 1980's.

## Data security & privacy

Please refer to TurboTax's privacy policy ([linked here](#)).

This website is not affiliated with Fidelity Brokerage Services LLC or any of its affiliates and the 3<sup>rd</sup> party is solely responsible for the information and services it provides.

## Employee experience

The Financial Wellness experience will include a direct link to TurboTax. These links will prompt users with a leaving site message before directing them to a custom landing page that welcomes Fidelity users. For more information on how we link to third parties, please see the Financial Wellness Service Overview.

TurboTax may email, text, or call employees if the employees chooses to engage with TurboTax.

## Data & reporting

Fidelity will not send any personal data to TurboTax. All personal data will be entered by employees directly on TurboTax's site. Fidelity may send TurboTax an anonymized client indicator for each employee that follows a link to TurboTax's site. This indicator will enable Fidelity to report on aggregated, anonymous data. For more information about data and reporting, please see the Financial Wellness Service Overview.

## Cost to employees

Employees will receive best-in-class discounts off tax preparation services at TurboTax if they utilize the link from NetBenefits.

## Fidelity compensation

Fidelity will not receive compensation from TurboTax.