



Retirement Product and Services Consultants

For you. For your business.

Inspired by your feedback, Fidelity is launching an innovative retirement servicing model — the Retirement Product and Services Consultants group. Its goal is to help you build lasting relationships and achieve greater success in 2002. With this new group, you'll have one Fidelity home office contact from plan prospecting through plan implementation.

All of our valued retirement investment professionals like you are receiving introductory calls from our new Retirement Product and Services Consultants. From here on, your Consultant will proactively provide you with new product and service updates. He/she will also assist you with new business, service agreement execution, plan transitions and much more. In short, you're getting improved response times, clearer accountability for the transition of new business and positive first impressions for your clients.

Retirement Product and Services Consultants as well as the new features you'll see below are all part of the Premium mantra to continually provide you with the most innovative capabilities to meet your changing needs.

Additional enhancements you've been asking for...

And others critical to improving your selling and servicing experience.

For more information about the 2002 enhancements and about our other Premium Service Program offerings, call (800) 684-5254 or log on to advisorxpress.com.

Achieve greater success in 2002



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Fidelity Investments Institutional Services Company, Inc., 82 Devonshire Street, Boston, MA 02109
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Additional enhancements

you've been asking for...

- New funds to round out Premium's asset allocation spectrum
 - Fidelity Advisor Korea Fund
 - AIM Small Cap Growth
 - Credit Suisse Value
 - Credit Suisse Small Company Value
- Voice recognition on the automated voice response unit
- A live operator opt-out added to the Premium 100 automated voice response unit
- Enhanced language capability when participants call the automated voice response unit and opt out to a live operator —interpreters available to translate 140 different languages
- More extensive NetBenefitsSM access for participant service representatives assisting with NetBenefits questions
- NetBenefits' Portfolio Rebalance — coming this spring and allowing participants to rebalance their entire retirement portfolio in one step

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And others critical to improving your selling *and servicing experience.*

- FidelityConnectSM — your new web-based data analysis and plan monitoring tool
- New, streamlined proposals which:
 - Advocate the value of the advisor
 - Include a new Premium 100 fund performance sheet to replace individual fact sheets
 - Provide straightforward and easy access to key selling information
 - New proposals
 - [Premium Proposal \[PDF\]](#)
 - [Premium 100 Proposal \[PDF\]](#)
- New employee enrollment materials — including the addition of a Spanish Employee Enrollment Guide to Premium 100 plans — designed to:
 - Advocate the value of the advisor
 - Appeal to diverse employee demographics
 - Maximize plan participation
 - Increase savings rates
 - New enrollment materials
 - [Employee Enrollment Guide \[PDF\]](#)
 - [Spanish Employee Enrollment Guide \[PDF\]](#)
 - [Employee Enrollment Forms Booklet \[PDF\]](#)

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