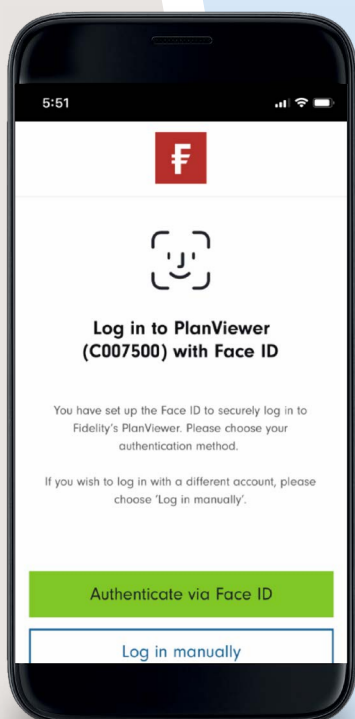


# Introducing the Fidelity PlanViewer app

Making it easy for your employees to manage their workplace pensions

**By downloading the Fidelity PlanViewer app your employees will be able to:**



- 1** Take control by accessing real-time information when they need it
- 2** Take action in a simple, user-friendly format
- 3** Learn more about their workplace pension

Available on Android and IOS



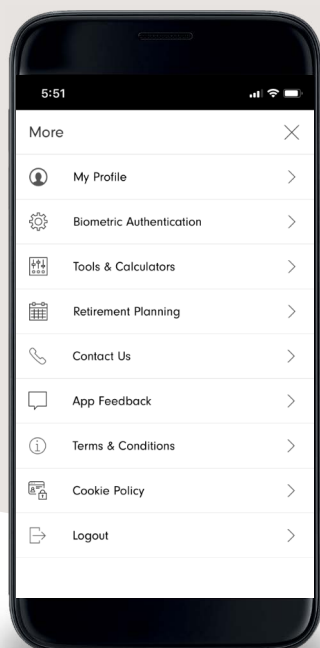
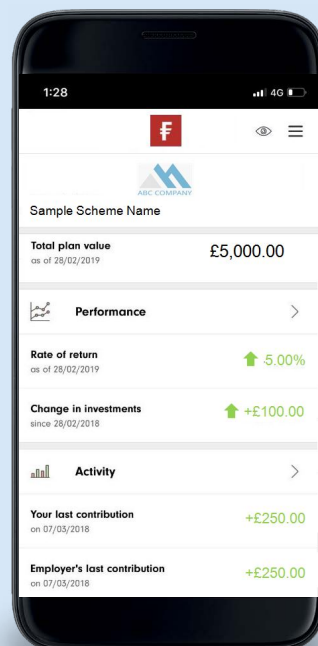
# 1. Take control

The Fidelity PlanViewer app provides employees with a wealth of real-time information that they can access directly from their smartphones.

Using sophisticated functionality, each employee's log-in area will be personalised to include information that relates to their **personal rate of return** and **recent plan activity** helping them take control of their retirement savings.

Within the tools area of the app, employees will have access to a host of useful planning **tools** to help them understand whether their savings are on track to deliver their **retirement goals**.

Employees will also be able to research different investment options to **chart and compare** how the various funds have performed.



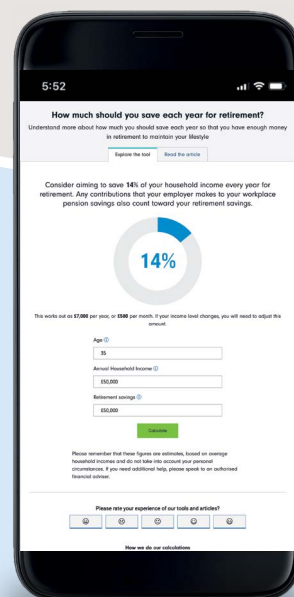
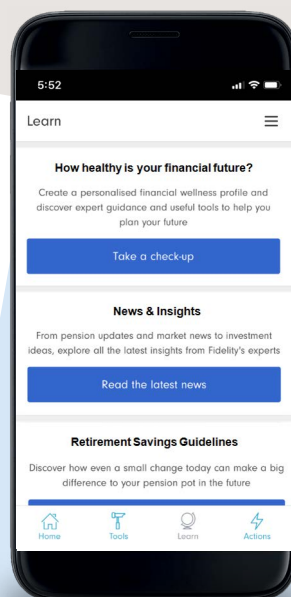
# 2. Take action

A simple navigation makes it easy for your employees to seamlessly access **plan summary data** and take actions such as drilling down into their **transaction history** to see when contributions were paid across, changing their **investment strategy** and updating their **personal details**.

Users will be able to complete a whole range of tasks, access support, provide feedback, and contact Fidelity for help or guidance.

# 3. Learn more

Employees will have access to a host of resources including our **personal money check up tool**, **Retirement Savings Guidelines** and regular market **news and insights** directly from Fidelity's network of experts.



# Market leading security

With the launch of the PlanViewer app, Fidelity have introduced two factor authentication in the account log-in process, both within the app and on our website.

Authentication factors:

- Device fingerprint
- Member's fingerprint
- Member's face ID
- Email pass code
- SMS pass code



Using **Apple and Google's biometric security**

developed specifically for iOS and Android, the WI app is able to provide facial recognition functionality. This means employees benefit from secure log-in that protects their data and ensures personal information is never compromised.

By choosing their own credentials, employees will also have easier access to their online accounts.

# Driving employee engagement

Using an integrated roll out plan, the launch of the PlanViewer app will have presence in all of our employee communications and further enhance our commitment to support your employees across multiple touch points.



PlanViewer app



Email



Podcasts



Video



Literature



Employer meetings



Member presentations



Pension Roadshows

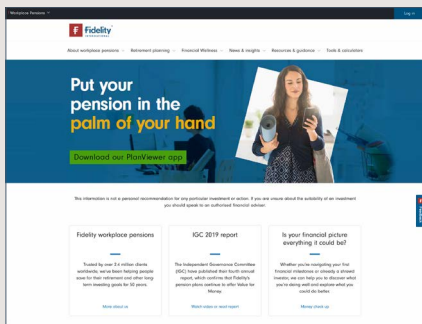


Website

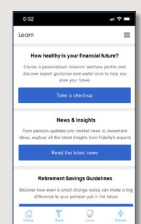
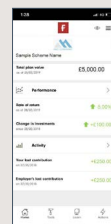
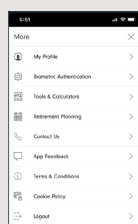
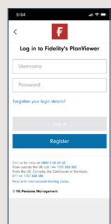
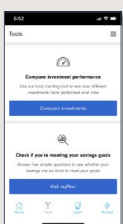


PlanViewer

Engaging, multi-channel communications will incorporate the PlanViewer app and encourage employees to take control in their time and on their terms.



The PlanViewer app is a user-friendly channel that will provide further insight allowing us to measure behaviour and employee preferences. It will allow us to capture feedback, ideas and suggestions directly from your employees which will in turn influence future engagement campaign activity.



## Tried and tested future developments

WI is at the heart of our global strategy. We combine the latest thought leadership and technology developments from across our global network with insights and solutions customised for local markets.

Versions of the PlanViewer app are available in a number of countries with further localised versions currently being tested. The advantage of this approach is that:

- The app technology framework and bulk of the development has already been completed, allowing us to focus on aligning the rules and parameters to meet the needs of the market and your employees
- The continuous cycle of development means that the app will evolve in line with market developments and member demand

