NEWS RELEASE

Fidelity Institutional® Raises the Bar on Its Technology Offering to Better Support Advisors and Their Clients

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Enhancements to WealthscapeSM and Wealthscape InvestorSM Provide an Improved User Experience

New Integrations and Digital Service Options Help Advisors Become More Efficient

New Digital Empowerment Tool Gives Insight into Firms' Digital Strategy and Adoption

BOSTON--(BUSINESS WIRE)-- Fidelity Institutional® today announced updates to the WealthscapeSM advisor technology platform, including a refreshed WealthscapeInvestorSM mobile app; updates to Integration Xchange, the open architecture digital store; and a new Digital Empowerment Tool. These new updates and tools offer advisors more choice and flexibility in their technology ecosystems to help drive their clients' experiences and their businesses forward.

"Firms have rapidly adopted digital tools to deepen client relationships, grow, and scale their businesses throughout the pandemic, and they're continuously looking for opportunities to enhance those experiences," said Tricia Haskins, Head of Integration Solutions, Fidelity Investments. "Personalization is top of mind for our clients, and providing open, scalable, and secure platforms that meet the technology needs of our clients and help them drive solutions has always been a priority for us. By providing an exceptional user experience, expanded integrations, and new digital capabilities, we're continuously innovating to ensure firms have the choice and flexibility they need in their technology stack to help make an impact on their businesses."

Expanded Digital Service Tools Improve User Experience and Personalization

Fidelity introduced Wealthscape Analytics, designed to highlight new opportunities for advisors to drive revenue and grow their businesses. Wealthscape Analytics provides:

- Business analytics: Key business metrics that provide actionable insights, including AUA, revenue and money movement trends to identify clients requiring attention.
- Segmentation: Insights that helps advisors tier their support model (by age, revenue, and more) and refine their businesses' development.
- Outliers: Advisors can analyze data points to discover outliers that could signal new opportunities to introduce new services or help prevent client attrition, all to better tailor their businesses' strategy.

Fidelity made enhancements to Wealthscape and Wealthscape Investor to provide an improved user experience for advisors and their clients. Updates include:

- A customizable Wealthscape homepage: Advisors can reconfigure the dashboard to display priority items that matter most for them and their businesses.
- Enhancements to the digital onboarding experience: Advisors can upload proprietary and supporting documents on behalf of their clients (transfer-of-assets, electronic fund transfers, and more), expanding on the extensive support of onboarding activities.
- Advanced digital service functionality: The availability of Virtual Assistant and Search helps users find what they need quickly and efficiently.
- A redesigned Wealthscape Investor experience: The Wealthscape Investor online experience now includes a streamlined login and security process, as well as a simplified, easy-to-use transaction history experience. The Wealthscape Investor mobile app was also redesigned to provide an enhanced user experience. The app now offers:
    - An intuitive, streamlined design for users to easily navigate and access important account information.
    - Enhanced access to account information, including account list, positions, balances, activity, trading, and mobile check deposit.
    - Advanced security features, including biometric login (face and fingerprint scan) and two-factor authentication.

Integration Xchange Continues to Enhance and Expand Capabilities

Integration Xchange, Fidelity's award-winningi, open-architecture digital store, is the "best-in-class" destination to imagine, develop and execute on firms' tailored, integrated technology vision.

Fidelity continues to enhance Integration Xchange through the addition of new fintechs, the introduction of new and deeper integrations, and enhanced digital service features that make it easier for firms to manage an increasingly complex technology ecosystem. The most recent offerings include:

- Enhanced digital service functionalities that allow advisors to easily monitor their digital certificate expirations and submit maintenance requests. Firms can also update their fintech data integrations to Integration Xchange, reducing paperwork and processing time.

- New expanded fintech integrations with Redtail, Wealthbox, and Laserapp, increasing choice and flexibility for firms as they develop tailored technology platforms to help meet the needs of advisors and their clients.
- An enhanced user experience, focused on analytics and digital service, including a new dashboard landing page to easily view digital certificate expiry and integrated fintechs. New resources include "how-to" videos and FAQs, as well as additional use-cases and resources for users.

New Digital Empowerment Tool Offers Glimpse into Effectiveness of Firm's Tech Strategy

Fidelity's new Digital Empowerment Tool provides an assessment of how well a firm is leveraging technology. Piloted with several large RIAs, broker-dealers and multi-family offices, the tool prompts firms to consider how their technology strategy, design, and activation are empowering their businesses. Fidelity also offers additional resources to spark conversations with firms on what it means to be digitally empowered, how to enhance their technology ecosystem through thoughtful design, and more.

For more information on Fidelity's Digital Empowerment Tool, visit **https://i.fidelity.com/digitalempowerment**. For more information about Wealthscape, visit **go.fidelity.com/Wealthscape**. For more information about Integration Xchange, visit **go.fidelity.com/IntegrationXchange**.

About Fidelity Investments

Fidelity's mission is to inspire better futures and deliver better outcomes for the customers and businesses we serve. With assets under administration of $11.8 trillion, including discretionary assets of $4.5 trillion as of December 31, 2021, we focus on meeting the unique needs of a diverse set of customers. Privately held for 75 years, Fidelity employs more than 57,000 associates who are focused on the long-term success of our customers. For more information about Fidelity Investments, visit **https://www.fidelity.com/about-fidelity/our-company**.

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i In April 2020, Integration Xchange won a Celent Model Wealth Manager award. Full description of award categories and criteria are available here: **https://www.celent.com/awards/model_wealth_manager/winners**. Integration Xchange also received the 2019 **WealthMangement.com** Industry Award for Custodian Technology. Full descriptions of award categories and criteria are available here:
https://events.wealthmanagement.com/categories

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