The following is a written transcript of a video recording of Fidelity investment professionals Edward Monaco, Selena Cefaloni, Robert Lancaster and T.J. Lauch. This content is for informational purposes only and is not intended to constitute a current or past recommendation, investment advice of any kind, or a solicitation of an offer to buy or sell any securities or investment services. There is additional important information at the end of this transcript.

Retirement Guidance Overview

(Ed Monaco) Clients come to us for so many reasons, but one of the primary drivers is that they're trying to better their financial future, for them and their family.

(Selena Cefaloni)It's a personalized approach. It's not cookie cutter. It's not something you're going --everybody's not going to have the same experience with Fidelity. But once we get to know you, we can help guide you the right way.

(Ed Monaco) And not everybody has the same needs. When they come to us, they all have a totally different life experience and financial situation.

(Selena Cefaloni) If this was your mother or your father, or your grandmother, how would you want them invested? How would you want to guide them?

(Robert Lancaster) I'll get hugs from clients.

(Ed Monaco) That's a good sign?

(Robert Lancaster) Yeah, I guess that's a good sign, right? I've received many hugs, clients who've actually told me, 'Thank you.' Say, 'Thank you, you know – you – I feel so much better when I leave here."

(TJ Lauch) You know, I love it. I mean, even meeting a client for the first time, I feel like at the end of the appointment, they give you this look, like, 'I can't believe I waited so long to come in.'

(Robert Lancaster)These people have shared some things that are just so personal to them – with us. And, I mean, that's a big responsibility and I couldn't be at a better place in Fidelity to help them, you know, reach those goals and achieve those goals.

(Selena Cefaloni) Many of us have different reasons for being in this business, and doing what we do, but I think the one connection that we all have to each other is that we want to help people.

We'll help you do MORE
with your retirement savings.

Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

Guidance provided by Fidelity is educational in nature, is not individualized, and is not intended to serve as the primary or sole basis for your investment or tax-planning decisions.

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