



FREQUENTLY ASKED QUESTIONS (FAQ)

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GENERAL

What is the Fidelity Greenline Forum (GLF)?

The Fidelity Greenline Forum (GLF) is an online community that offers its members a platform to express their opinions on various aspects of Fidelity Investments through surveys, polls, discussions, and interviews. The feedback provided by forum members influences strategic decision-making, leading to ongoing enhancements in products and services.

Why join the GLF?

By joining the forum, you become an essential voice in the development and improvement process. Your views, opinions, and feedback will directly contribute to improving current products and services and shaping future offerings that truly meet your needs and preferences. Additionally, you will not only contribute to the collective knowledge but also receive a newsletter periodically with key insights from the surveys and other activities conducted on the forum.

What after joining GLF?

After joining the forum, you will begin receiving email communications from us directly to your inbox. You can expect to receive periodic invitations to participate in surveys and other activities. Furthermore, as a forum member, you will gain access to a dedicated website/portal that provides convenient access to GLF newsletters and select Fidelity articles. Your participation in these activities is completely voluntary and you can opt out at any time.

**Can any of my family members or friends be a member of the GLF?**

GLF is an exclusive, invite-only community specifically designed for Fidelity customers. Periodically, invitations are extended to select Fidelity customers. Therefore, if you and a family member or friend have received invitations, we strongly encourage both of you to join our forum.

Is there a fee or cost associated with the GLF membership?

No, joining the Greenline Forum is completely free of charge. There are no subscription fees or hidden costs associated with becoming a member of the forum. We trust that your participation in these activities will be enjoyable and rewarding!

How can I unsubscribe from GLF?

By unsubscribing from GLF, you will no longer receive email communications or have access to the GLF website. Additionally, you will miss out on the opportunity to gain valuable insights from surveys and activities, and the opportunity to contribute to shaping future offerings. Please note that participation in our surveys and activities is voluntary, and if you wish to skip certain surveys or activities, you have the flexibility to do so without unsubscribing. However, if you still wish to unsubscribe from the forum, you can do so by clicking on the "Unsubscribe" link provided at the bottom of any email communication you receive from GLF. Alternatively, you can also reach out to our support team at support@fidelitygreenlineforum.com.

Is it possible to rejoin the forum after unsubscribing previously?

We value your participation and contributions to the community, and should you decide to rejoin in the future, just email us at support@fidelitygreenlineforum.com and we will be happy to have you back.

ACTIVITIES AND PARTICIPATION

What types of activities or communications will I be a part of on GLF?

You can anticipate communications on a variety of engaging activities that aim to gather your valuable input and provide you with insightful content. We conduct activities for participation such as surveys, quick polls, discussion boards, and in-depth interviews. Your participation in these activities is optional, and you have the freedom to engage only with the ones that interest you. In addition to participative activities, you can periodically expect emails to read GLF newsletters, which consist of essential insights and highlights from GLF surveys, quick polls, and discussion boards.

**What are the topics around which the activities are conducted?**

We strive to create activities on a diverse range of topics to gather insights and feedback from our valued members. These topics can vary based on current market trends, customer preferences, and specific research objectives. Some common areas of focus include customer satisfaction, product feedback and improvement, market trends and analysis, user experience, and future product development.

When will I receive my first invitation to participate in an activity, after signing up?

The timing of your first invitation to participate in an activity after signing up may vary. While we strive to provide opportunities for engagement as soon as possible, the availability of an activity depends on various factors such as business needs and whether you fit the right profile required for that activity. Rest assured that once you have joined the forum, you will be included in our mailing list and will start receiving invitations to participate in activities as they become available. We encourage you to keep an eye on your inbox for updates from us.

How frequently will I be invited to share my opinion in activities?

The frequency of invitations to participate in activities and share your opinion on GLF may vary. We aim to provide our members with regular and diverse opportunities to provide their insights and perspectives. However, it ultimately depends on various factors such as the availability of activities, and the participant profile required for each activity. Rest assured that once you have joined the forum, you will be included in our mailing list and can anticipate receiving invitations periodically.

What will the invite email for participation in an activity look like?

The invitation email you receive will provide you with details to help you make an informed decision about participating in the activity. It will contain a direct link to the activity along with a clear objective, allowing you to understand its purpose. Additionally, the email will include the estimated time required to complete the survey or participate in the activity, giving you an approximation of the time commitment involved. Furthermore, the duration during which the survey or activity will be open will be specified, ensuring you are aware of the timeframe available for your participation. It's important to note that the specific details included in the invitation email may vary depending on the type of activity being conducted.

How much time can I expect to allocate for completing an activity?

We value your time and strive to make our activities as efficient as possible. The duration of each activity may vary depending on its complexity and nature. On average, GLF surveys take around 10 minutes to complete, with a range of 3 to 20 minutes depending on the complexity of the questions. Quick polls are designed to be



completed in a minute or less, consisting of a few brief questions. Discussion boards generally require more than 20 minutes to complete, as they involve providing detailed answers. Some discussion boards might be conducted across weeks with approximately 20 minutes of tasks each week. In-depth interviews (IDIs) involve engaging in a conversation with a Fidelity representative and generally require more than 30 minutes.

What will happen if I do not want to participate or do not have time to participate in a particular survey or activity?

Participation in any specific survey or activity on GLF is completely optional and based on your personal preferences and availability. We appreciate your active engagement, but ultimately, the decision to participate is entirely up to you, allowing you the freedom to select the surveys and activities that resonate with you. Rest assured, you will continue to have opportunities to participate in future surveys and activities that align with your interests.

Can I save my progress and complete a survey or activity at a later time if I am unable to finish it in one session?

Yes, in most cases, you will have the flexibility to complete a partially filled survey or activity at a later time. Our system is designed to allow you to save your progress and return to where you left off. When you access the survey or activity link again, you should be able to continue from the point where you previously stopped. This feature enables you to complete longer surveys or activities at your own pace and convenience. However, please keep in mind that there may be specific cases where the nature of activity does not allow for pausing and resuming such as in-depth interviews (IDIs).

How long will a survey or activity be available for participation?

The availability duration for each activity may vary depending on its specific requirements and objectives. In general, links to GLF surveys and polls are active for a week from the time they are launched, allowing participants sufficient time to provide their valuable feedback. However, it's important to note that the duration may differ for certain surveys or polls, and the timeframe will be communicated in the invitation email. For activities like discussion boards and in-depth interviews (IDIs), the registration link to express interest in the activity remains active for a limited period, typically a few days, due to the high customer interest they generate. Once shortlisted for these activities, the active period will depend on the complexity and will be communicated to you in the invitation email.



Is there an incentive or reward for my participation in the surveys or activities?

Participation in the surveys and other activities on the forum is entirely voluntary and does not carry a general incentive or reward. However, we do occasionally offer incentives for specific activities. These incentives are provided as a token of appreciation for your time and valuable input. Rest assured, any incentives or rewards associated with these activities will be communicated in the email invitation of the specific activity.

PRIVACY AND DATA SECURITY

What happens to the responses I give in a GLF activity?

The responses you submit in GLF activities remain entirely confidential. They are securely collected by Escalent on behalf of Fidelity Investments, who has entrusted Escalent to develop, gather, and analyze the responses on GLF. The purpose of collecting your responses is solely to analyze trends, gather valuable insights, and enhance Fidelity's products and services. All data is anonymized and aggregated, ensuring the confidentiality of individual responses. We adhere to strict data protection policies and comply with applicable privacy regulations to safeguard your information. To learn more about how Fidelity Investments handles your data, we encourage you to review the privacy statement [here](#).

What do you do with the personal information I provide?

We consider the protection of personal information the foundation of customer trust and sound business practice. Fidelity Investments does not share personal information about its customers with unaffiliated third parties for use in marketing their products and services. We adhere to strict data protection policies and comply with applicable privacy regulations to safeguard your information. To learn more about how Fidelity Investments handles your data, we encourage you to review the privacy statement [here](#).

WEBSITE

What is the GLF website and how can I use it?

Greenline Forum's website, located at www.fidelitygreenlineforum.com, serves as a convenient online portal exclusively for our members. By accessing the website, you can delve into a curated selection of Fidelity articles, providing insights into industry trends. The website also provides a glimpse as well as links to Fidelity's active presence on popular social media platforms such as Facebook, Twitter, and YouTube, allowing you to explore additional content. Also, in case you happen to miss our newsletters in



your inbox, you can browse through the GLF newsletters on the website itself to get key highlights from recently conducted studies and activities on the forum. Furthermore, we may occasionally organize engaging activities like discussion boards directly on the website.

Is it possible to view member profiles or interact with other members through the website?

To ensure the privacy and security of our members, the viewing of member profiles and the sending of messages to other members is not available on the website. We prioritize the protection of personal information and respect the confidentiality of our members. GLF website simply serves as a centralized platform to access key resources, while safeguarding the privacy of its members.

How can I personalize/update information on the GLF website?

To personalize or update your information on the GLF website, simply click on the profile icon located at the top right-hand corner of your homepage. In the dropdown menu that appears, select 'My account' to access your personal information. Within the 'My account' section, you'll have the option to modify various aspects of your profile, including your name, email address, contact information, avatar, and more. Feel free to make any desired changes to ensure your information is accurate and up to date. Once you have made the necessary updates, don't forget to save your changes by clicking the 'Save' button located at the bottom of the page. Information fields other than your email address and username are optional in nature and you can proceed without updating these.

How can I change my GLF website password?

To change your password for the GLF website, access your account settings by clicking on the profile icon located at the top right-hand corner of your homepage. From the dropdown menu, select 'My account' to navigate to the 'Information' tab, where you will find the 'Connection Data' section. Under this section, click on the 'Change My Password' button, and the space will expand prompting you to enter your old/current password and the new password you wish to set. Confirm your new password by entering it again, and then click on the 'Save' button at the bottom of the page. This will save your new password.

How can I reset my GLF website password if I have forgotten it?

To reset your password for the GLF website, on the login, click on the 'Forgot your password?' button. Enter the email address associated with your GLF account and click on the 'Send' button. Look for an email titled 'Fidelity Greenline Forum – Reset your password' from support@fidelitygreenlineforum.com in your inbox (don't forget to



check your spam/junk folder) with the link to reset your password. Please note that the password reset link will be active for a limited duration. Click on the link in the email, which should take you to a page where you have to enter and confirm your new password. After saving the changes, you can log in to the GLF website using the new password.

TECHNICAL ASPECTS

How can I change my email ID associated with GLF?

If you are transitioning to a new email ID or wish to associate a different email ID for your engagement with GLF, please send an email to our support team (support@fidelitygreenlineforum.com). In your email, kindly provide the new email ID that you would like to use to receive communications from us. Our dedicated support team will promptly update your information in our systems, ensuring that all future GLF communications are directed to your new email address.

What should I do if I am not receiving emails from GLF?

If you haven't received any communication from us for an extended period, we encourage you to check your email settings and ensure that our emails are not being filtered or blocked. In some cases, our emails may end up in your spam or junk folders, so we suggest checking those folders as well. If you can locate any email from GLF, please mark us as a trusted sender or whitelist our email address support@fidelitygreenlineforum.com. This will help ensure that future emails from us are delivered directly to your inbox. If you have taken these steps and are still not receiving our communications, we kindly ask you to reach out to our support team. They can verify whether we have sent you any communication during the mentioned period and assist you in resolving the issue.

Can I participate in an activity using my mobile device?

Absolutely! You can participate in most activities on GLF using your mobile device. Our platform is designed to be mobile-friendly, allowing you to conveniently engage in activities on the go. We understand the importance of accessibility and are continuously working to broaden compatibility across all web-enabled devices. So, whether you prefer to participate on your computer, tablet, or smartphone, you can easily join in the activities and share your valuable input.



What steps can I take to troubleshoot if a survey fails to load before contacting the support team?

If you encounter any issues with a survey failing to load, there are a few troubleshooting steps you can try before contacting our support team. Firstly, check your internet connection to ensure it is stable. You can try refreshing the page or accessing the survey using a different browser. Clearing your browser's cache also helps resolve any loading issues. Additionally, disabling any browser extensions, plugins, pop-up blockers (such as DuckDuckGo) or firewalls temporarily could resolve any conflicts as they do not allow direct links to open. If the problem persists, you can try accessing the survey from a different device to see if it is a device-specific problem. If none of these steps resolve the issue, please reach out to our support team. Provide specific details about the problem, such as the browser you are using and any error messages you encounter, to help us assist you more effectively.

ADDITIONAL RESOURCES

Where can I contact the forum support team for any concerns or issues?

If you have any concerns or issues related to the Greenline Forum, you can easily reach out to our support team for assistance at support@fidelitygreenlineforum.com. Alternatively, navigate to the GLF website and look for the 'Technical Support' button at the bottom of the page. Whether you have questions, encounter technical difficulties, or need help with any aspect of the forum, our dedicated support team is ready to assist you.



If you have further questions, please feel free to email support@fidelitygreenlineforum.com.

Note: We will respond to your question as soon as we can. You can also use this email address to share any additional thoughts or ideas that you have or if you experience any technical glitches.

Greenline Forum's mission is to be a community of those who passionately support smart financial solutions. We stand by our objective of enabling you to help shape Fidelity's solutions for you and your family. We value your opinions and suggestions and will let you know how you've helped make a difference by sharing news, concepts, and products that are most relevant to you.

Views expressed are as of the date indicated and may change based on market and other conditions. Unless otherwise noted, the opinions provided are those of the speaker or author, as applicable, and not necessarily those of Fidelity Investments.

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