

▶ Fidelity Investments

Fidelity College Relations

▶ Agenda

- Fidelity facts
- Where we are located
- How we do business
- Who are Fidelity's competitors
- Working at Fidelity
- Fidelity College Relations
- Contact Information

► Fidelity Facts

- The largest mutual fund company in the United States
- One of the world's largest providers of financial services for more than 22 million individuals
- The nation's #1 provider of 401k retirement saving plans
- A leading provider of 403(b) retirement plans for not-for-profit institutions
- Investment in Technology exceeds \$2 billion annually

► Fidelity Facts

(continued)

- There are over 40,000 Fidelity employees that work in the United States and Canada
- There are 393 Fidelity funds
- Fidelity web sites handle an average of 1.6 million contacts per day
- Our phone centers answer over 260,000 calls per business day
- Total managed assets is approximately \$1.2 trillion



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Where We are Located



- Headquartered in Boston
- 11 Regional Operations Centers
- 40,000 + Employees
- 111 Investor Centers
- Locations in 23 Countries on 4 Continents



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Regional Offices



New England Region

*Boston, MA; Merrimack, NH;
Marlborough, MA; Smithfield, RI*



Southeast Region

Durham, NC; Jacksonville, FL



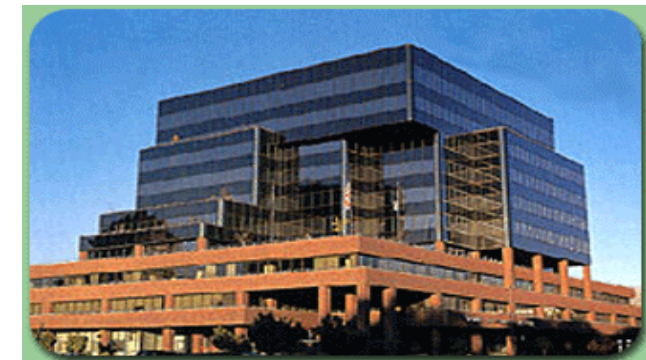
Midwest Region

*Blue Ash - Cincinnati, OH;
Covington, KY*



Southwest Region

Irving, TX; Westlake, TX



Western Region

Salt Lake City, UT



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How We Do Business

Fidelity Brokerage Company

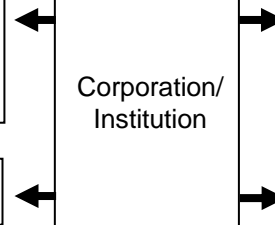
- Fidelity Personal Investments
- Registered Investment Advisor Group
- National Financial Correspondent Clearing
- Fidelity Operations and Services Group
- National Financial Markets Group
- Family Office services



Individual Investors

Fidelity Employer Services Company

- Fidelity Human Resources Co.
- Fidelity Investments Retirement Services Co.
- Fidelity Investments Tax-Exempt Services Co.



**Employees/
Employers**

Pyramis Global Advisors

- Fidelity Management Trust Co.

Fidelity Financial Intermediary Services

- Fidelity Investments Institutional Services Company, Inc.



**Intermediary/
Advisor Clients**



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▶ Devonshire Investors

- Strober Organization – est. \$1billion in sales in '05
 - Acquired Northlake Lumber Company and Lanoga
- Veritude – revenue up 20%
 - Serving the customer better, faster & cheaper
 - Key Clients: Blue Cross Blue Shield of Massachusetts, EMC, Hanover Insurance Group, LG Electronics, MIT, Upromise
- Boston Coach – record revenue of \$123 million
 - Partnering with FeB for WIFI in selected cars
- The Seaport Hotel
- The World Trade Center Complex
- Sebastian's



Fidelity's Competitors



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► Why Work at Fidelity?

Career Options

Community of different businesses, multitude of career opportunities and career paths, culture of cultivating our own & constant learning...

Employee Benefits

Comprehensive health care offerings, generous retirement savings plans, flexible work options, tuition reimbursement...

Challenging Work/Smart People

Entrepreneurial culture driven by innovation, industry leader, challenging work, constantly changing and improving, dedicated employees...



Employee Benefits Overview

Health & Insurance

Medical and dental coverage, TaxSaver accounts, disability coverage, life insurance, and more.

Retirement

Pension Plan, a Profit Sharing Plan (including a 401(k) program).

Work/Life Programs

Tuition Reimbursement Plan, Auto and Homeowner's Insurance, Commuter Benefit Program, Concierge Services, Computer Equipment Purchase Assistance Program and more.

Training & Development

Broad range of online and classroom training and development resources.



▶ Candidate Attributes/Success Factors

- Team Work and Collaboration
- Initiative
- Organization Skills
- Customer Service Oriented
- Technology Skills
- Problem Resolution
- Communication Skills
- Influence
- Presentation Skills

► Functional Areas

- Finance & Accounting
- Investment, Support & Brokerage
- Relationship Management & Sales
- Retirement & Employer Services
- Technology
- Administration
- Human Resources
- Legal, Compliance & Audit
- Risk Management
- Customer Service
- Marketing, Advertising, Media & Communication

► Types of Entry-Level Positions

- Financial Analyst
- Capital Markets Associate
- Research Analyst
- Customer Service Associate
- Fund Accountant
- Internal Sales Representative
- Actuarial Analyst
- Investor Center Financial Representatives
- Management Consultant
- Project Manager
- Business Analyst
- Retirement Investment Specialist
- Sales/Relationship Management
- Systems Analyst
- Enterprise-wide opportunities

► Fidelity College Relations

The College Relations team will lead Fidelity's college recruitment efforts in alignment with the Firm's workforce strategy and business objectives. We will develop and maintain strong relationships with the *right* schools in order to attract the *right* talent for Fidelity.

► Increasing Fidelity Opportunity on Campus

To increase opportunities for Fidelity to hire on campus, we would be interested in knowing more about:

- All recruiting event opportunities, including those other Fidelity groups may be involved in
- Recommendations and contact information for on-campus student organizations and alumni groups
- Departments and faculty that wish to partner with Fidelity
- Demographic statistics about students (i.e. where are they hailing from? Which states are they going to for their first jobs?)
- Diversity on your campus
- Fidelity employees hires from your campus



▶ Student Access to Fidelity

We encourage your students to consider Fidelity. We invite students to:

- Review Fidelity Benefits and FAQ information
- Apply to positions on the fidelitycareers.com website

