

## Discover the benefits of Fidelity's Private Investment Program

### VISUAL

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**SUPER:** Focused. Disciplined. Professionals.

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**SUPER:** Institutional-style management approach

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**SUPER:** Fidelity Private Investment Program

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**SUPER:** Prioritize value over the long haul

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**SUPER:** Service-oriented

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**SUPER:** Custom portfolio service

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**SUPER:** Tiered pricing

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**SUPER:** Fees drop as investment amounts increase.\*

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**SUPER:** Non-traditional. Tax-smart. Risk management.

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### AUDIO

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In a world that seems full of distractions, where people's attention spans seem to be getting shorter and shorter, the wealth you've accumulated over time deserves full attention, focus and a measured investment discipline.

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Experts who do one thing and one thing only: professional money management. Giving your money an institutional-style investment management approach.

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That's where Fidelity's Private Investment Program shines, by helping you achieve your long-term investment goals.

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For established and savvy investors like you who prioritize value over the long haul, it's a

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service-oriented program built on an institutional-style investment

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management approach. We offer a custom portfolio service that allows you and your advisor to select pools which are automatically rebalanced, based on your chosen frequency, to keep your investment strategy on track.

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This program is designed around carefully selected and constructed pools aiming to achieve specific goals or objectives. In addition, our tiered pricing

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structure is based on investment levels. Whether you have \$250K or over \$10M, there are progressive pricing benefits where fees drop as investment amounts increase.

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You'll gain exposure to non-traditional asset classes, tax-smart options and a focus on risk management.

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You've earned the right to expect this premium level of service, such as enhanced account reporting, plus access to a dedicated client services team.

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\* As at April 4, 2023, investors in Fidelity Private Investment Program may qualify for reduced pricing through combined management and administration fee rebates (class) or distributions (trust) before sales tax ("fee rebates"). For the Pools, the amount of the fee reduction is based on the amount invested in each Pool and begins on the first dollar over \$250,000 invested. Fee reductions apply only on that portion of assets that fall within the specified tier. For example, if an investor holds \$1 million in Series B shares of an equity Pool, then the reductions apply as follows: zero for the first \$250,000 in assets; five basis points on that portion of assets above \$250,000 and below \$500,000; ten basis points on that portion of assets greater than \$500,000 up to \$1 million. Please reference the Pool's Prospectus for Private Investment Program financial grouping rules.

## VISUAL

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**SUPER:** Premium service

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Fidelity Private Investment Program (Wordmark)

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[fidelity.ca/PIP](https://fidelity.ca/PIP)

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## AUDIO

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Discover how Fidelity Private Investment Program could support your investment objectives.

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You've worked hard to get ahead. We're here to help you stay ahead.

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Commissions, trailing commissions, management fees, brokerage fees and expenses may be associated with investments in mutual funds and ETFs. Please read the mutual fund's or ETF's prospectus, which contains detailed investment information, before investing. Mutual funds and ETFs are not guaranteed. Their values change frequently, and investors may experience a gain or a loss. Past performance may not be repeated.

Certain Class Funds are closed to new purchases and switches for registered plans, except for existing systematic transactions. Certain other Class Funds are not recommended for registered plan investors and registered plan investors should consider the trust fund equivalent for these Class Funds instead. Registered plan investors should also be aware that certain Class Funds may, from time to time bear an income tax expense which will reduce returns. Please read the fund facts for further details.

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