

Financial Literacy and Fidelity

Fidelity's mission is to help our customers plan and achieve their most important financial goals. A key driver of that mission is our investment in the future of youth and the communities where we live and work. **That's why we support a year round approach to financial literacy education.**

Achieving [financial mobility](#) is about more than just making money, it's about young people developing the financial skills and discipline necessary to make better personal finance and investing decisions for their life. Yet, surveys show that young people don't often feel prepared.



More than 50%

of young adults feel anxious about finances.¹



Less than 45%

of U.S. adults feel confident making financial decisions because of prior knowledge.²



53%

of Americans didn't know about basic financial concepts.³



Fidelity's Invest in My Education (ME)SM

A \$250 million program designed to help underrepresented students complete their college education without incurring debt by providing scholarships and access to ongoing support and mentorship. In 2023, 200 Fidelity Scholars were awarded scholarships across 63 higher education institutions.



Council for Economic Education (CEE)

Fidelity supports CEE and its mission to equip K-12 students with the tools and knowledge of personal finance and economics so that they can make better decisions for themselves, their families, and their communities.



Fidelity Financial Forward[®]

We're invested in the future of youth and the communities where we live and work. That's why Fidelity Financial Forward[®] is fast tracking financial education, providing support to K-12 students and teachers in historically underserved communities. To date, this program has served more than 550,000 students.



Fidelity Financial Forward[®] for Universities

A program where universities can work with Fidelity to help shape a financial education experience for their students. The program is currently live at five universities.



Fidelity YouthTM Account

Fidelity launched the Fidelity YouthTM Account and app to teach teens how to make, manage, and invest their own money with extensive educational content and tools.

Fidelity is focused on the needs of our communities and continues to support financial literacy through our vast network of investor centers and offices across the country. The Fidelity Cares program provides employee volunteer opportunities that support students and families with the educational foundation to attain personal and financial success.

Over 9,200

associates volunteered their time

\$20.7M

re-invested in community through Skills-Based Volunteerism

as of January 2024

Fidelity is deeply committed to working with policymakers at all levels — federal, state, and local — to give back to the communities where our associates live and work. This commitment extends to our advocacy in pursuit of principled and sound public policy solutions.

For more information about Fidelity Investments [visit us online](#) and follow us on X [@FidelityPolicy](#).

¹ National Financial Capability Study, 2022

² Information sourced from the September 21-24, 2022 Study for the National Endowment for Financial Education (NEFE)

³ FINRA Investor Education Foundation's [National Financial Capability Study](#), 2021, pg. 25