

# Financial Literacy and Fidelity

At Fidelity, we're invested in the future of the communities where we live and work. That's why we support a year-round approach to financial literacy education.

Support for financial education is a building block for stronger communities and our country. It is no surprise a recent study found 53% of Americans didn't know about basic financial concepts.<sup>1</sup> The financial well-being of Americans' remains uneven across different demographic groups in the study with BIPOC communities falling behind the rest of the country.



**33%**  
of Black  
families

**28%**  
of Hispanic  
families

**51%**  
of non-Hispanic  
white families

Despite this outlook Fidelity continues to be inspired to make a definitive change in our communities through robust financial literacy education all year round.



## Fidelity's Invest in My Education (ME)<sup>SM</sup>

\$250M initiative provides access to education and ongoing support to, potentially, 50,000 Black, Latino, and historically underserved students by combining student scholarships with ongoing educational and work support.



## Economic Opportunity Coalition (EOC)

Fidelity is a founding member of a group of companies and Foundations convened by the U.S. Treasury to accelerate inclusive economic growth. Our focus is on education, and skills-based volunteerism to drive impact.



## Fidelity Financial Forward<sup>SM</sup>

Financial literacy education to K-12 students and teachers in underserved communities. To date, this program has reached more than 4,500 teachers and more than 450,000 students.



## Fidelity University Student Program

Beginning with the University of Kentucky, this program includes a combination of online, in-person education, digital tools and resources, and a mobile app designed for students and student athletes.



## WNBA's Connecticut Sun

Collaboration to provide financial education and access to the next generation of young women delivered during summer camps with scholarships and ongoing virtual financial education to student athletes.

Fidelity is focused on the needs of our communities and continues to support financial literacy through our vast network of branches 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.

**15,000+**  
associates donated  
their time

**1,500+**  
community projects  
supported

as of April 18, 2023

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 Twitter [@FidelityPolicy](#).

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<sup>1</sup>FINRA Investor Education Foundation's [National Financial Capability Study](#), 2021, pg. 25

<sup>2</sup>[Economic Policy Institute](#), 2016, chart 6

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