

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.¹ 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)SM

\$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 ForwardSM

We're invested in the future of youth and the communities where we live and work. That's why Fidelity Financial ForwardSM 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 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 specialized financial account designed for students and 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.

20,000
associates donated
their time

\$20.7M
re-invested in community
through Skills-Based
Volunteerism

as of January 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 X [@FidelityPolicy](#).