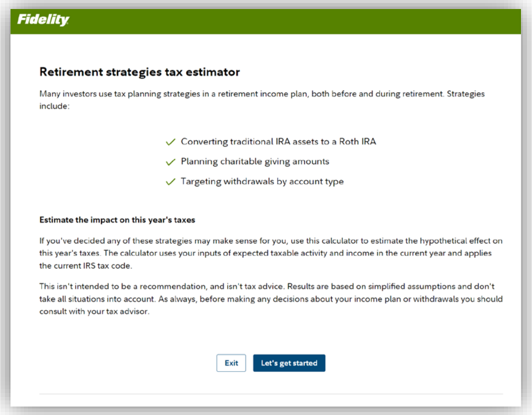
FIDELITY WEALTH MANAGEMENT WEBINAR

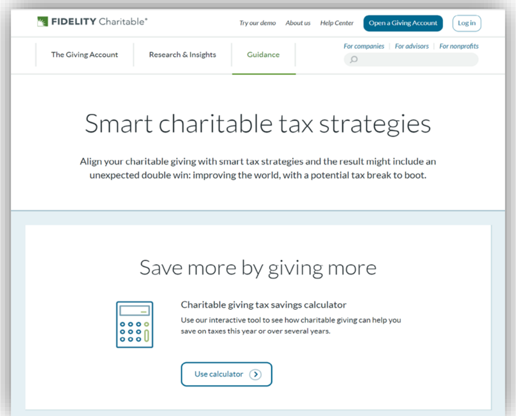
Insights Live: Tax-smart strategies for your portfolio

September 15, 2022

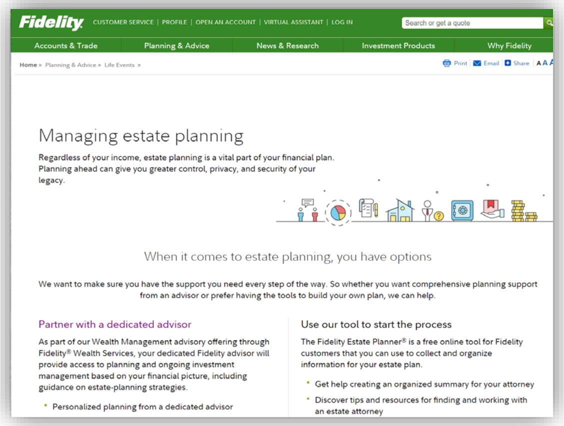
Additional Helpful Resources



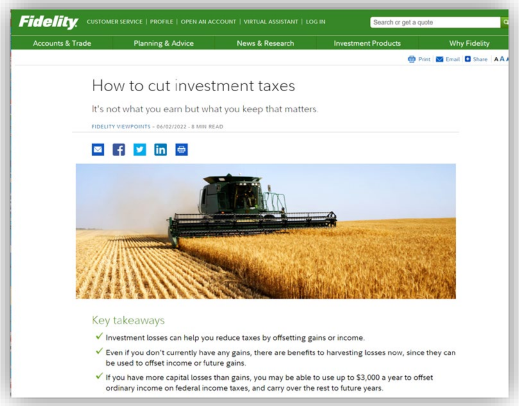
Retirement strategies tax estimator



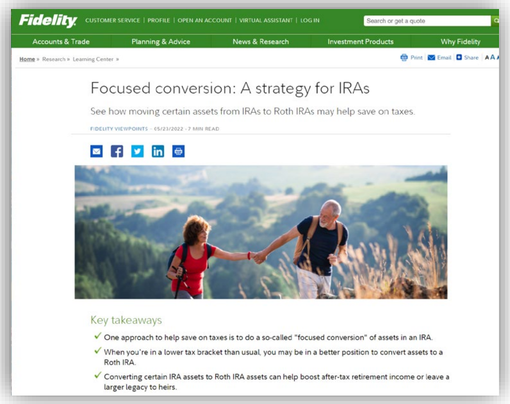
Smart charitable tax strategies



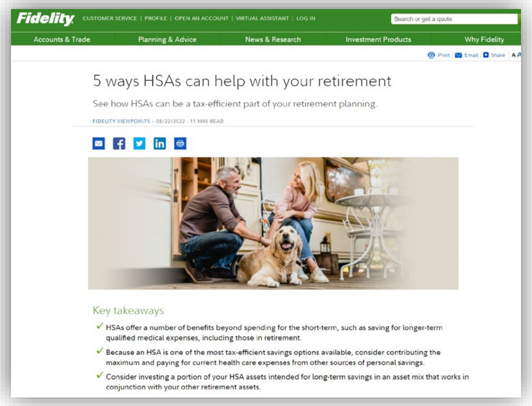
Managing estate planning



How to cut investment taxes



Focused conversion: A strategy for IRAs



5 ways HSAs can help with your retirement

Tax-savvy withdrawals in retirement

Our Speakers

Christopher Fusé
Portfolio Manager, Fidelity Investments
Chris Fusé is a portfolio manager at Strategic Advisers LLC, a registered investment adviser and a Fidelity Investments company. In this role, Mr. Fusé is head of asset allocation for taxable assets within Strategic Advisers in addition to being responsible for setting various tax policies. Prior to assuming his current position, Mr. Fusé served as a portfolio manager and head of investment management.

Louis Gentile
Regional Vice President, Advanced Planning, Fidelity Investments
Louis (Lou) Gentile and his team partner with Fidelity advisors to help clients address their unique planning and wealth transfer goals. He joined Fidelity in 2015 as a regional vice president of Advanced Planning. In this role, Lou leads a regional team of professionals responsible for educating both clients and the broader Fidelity organization regarding family wealth planning strategies, including estate, trust, gift, and charitable planning techniques.

Gina Gillespie
Vice President, Financial Consultant, Fidelity Investments
Gina is a vice president and financial consultant at Fidelity Investments and is based in Burlington, Massachusetts. In this role, Gina works with clients to understand their personal and professional goals in order to help them create a sound investment plan catered to their needs. Through collaboration with clients, she helps them understand and feel empowered by their strategy.

Natasha O'Yang
Regional Vice President, Fidelity Charitable®
Natasha has been with Fidelity Charitable® since 2019. Before joining Fidelity Charitable, she spent four years providing in-depth financial plans for high-net-worth individuals in the San Francisco Bay Area. Her current role focuses on equipping financial advisors with the latest philanthropic strategies and legislative changes to best serve their clients. Nastasha also educates donors on how to leverage their charitable giving to create the largest impact toward their favorite causes at events all over the West Coast.

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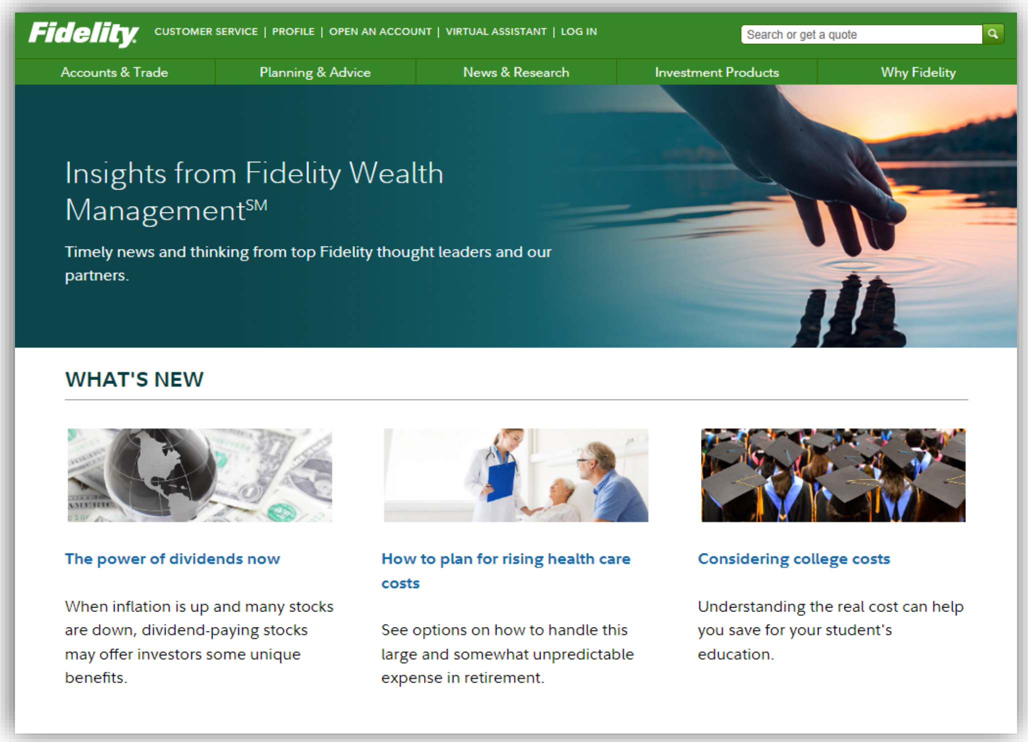

For illustrative purposes only.

Important Information

Investing involves risk, including risk of loss.

Past performance is no guarantee of future results.

Diversification and asset allocation do not ensure a profit or guarantee against loss.

US stocks grew an average of 12% in the 24 months following mid-term elections; US stock performance represented by S&P 500 Index total return from 1/1/1950-12/31/2020. Returns include reinvested dividends. Source: Bloomberg Finance, LP as of 9/1/22.

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