

FIDELITY FUTURESTAGE.®

CASE STUDY

A Social Responsibility Program for Fidelity Investments

"This experience
TAUGHT ME
that I can achieve anything."
— Gustavo Hernandez, age 17



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FIDELITY
FUTURESTAGE®



*Gustavo performing with the
Boston Pops, May 2012, 2009*

BACKGROUND

About the Program

Fidelity FutureStage, a comprehensive arts education program, leveraged existing relationships with renowned arts organizations to address the decline in funding of school arts programs by providing critical resources to less-advantaged public school students. The program focused on two core components: theater and music education.

Program Objectives

- Enhance Fidelity's reputation by illustrating an authentic commitment to the community
- Emotionally connect current and potential investors
- Generate positive media coverage
- Engage with influencers and celebrities
- Create customer engagement opportunities

Music Program

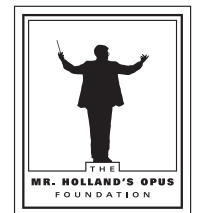
- Instrument donations
- Professional coaching
- Symphony experiences
- Musician school visits
- Performances at concert halls

Theater Program

- Playwriting
- Professional mentoring
- Theater experiences
- Celebrity workshops
- Performances on Broadway



Partners





CHALLENGE

Create an unified brand framework using a sponsorship portfolio of varied properties to increase brand awareness among affluent consumers.

APPROACH

Conducted a comprehensive brand study to determine which sponsorship opportunities provided a logical brand fit, a strong emotional appeal, and engagement opportunities with our target audience of high net worth clients and prospects.

RESULTS

- Over 30,000 students were impacted by the program
- More than \$2 million worth of instruments were donated to public schools across the U.S.
- 664,155,216 media impressions
- 793 media articles/broadcasts
- Instrument donations were integrated at nearly 150 client events in 71 cities
- Viral Marketing campaign engaged more than 350,000 participants from 127 countries
- Nearly 25,000 people attended competition finales
- Net Promoter Score (NPS) of 63 by clients who attended the competition finales
- Over 84% of clients and 68% of symphony audiences said FutureStage differentiated Fidelity from other financial services companies
- Over 90% of clients and 58% of symphony audiences said FutureStage enhanced their perception of Fidelity

RESEARCH

Consumer Research Study indicated that sponsorship of community events and social causes can enhance corporate reputation.

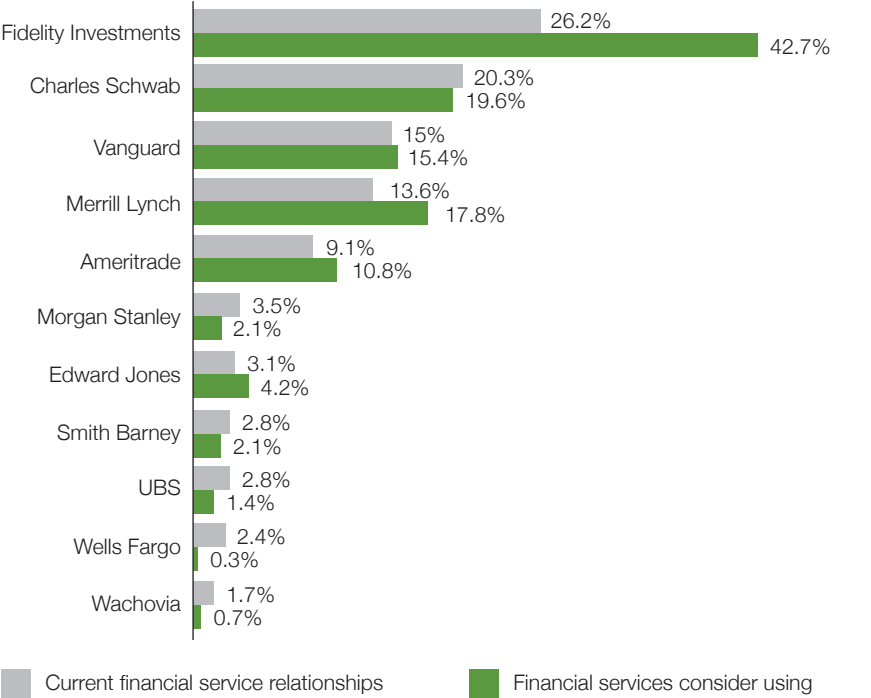
A sponsorship effectiveness survey found that attendees ranked two of Fidelity's reputation attributes significantly higher than the benchmark.



■ Benchmark ■ Post-sponsorship

* Source: Sponsorship Survey conducted by Performance Research for Fidelity Investments, 2005

Fidelity's support of arts increased consideration among affluent market.



* Source: Sponsorship Survey conducted by Performance Research for Fidelity Investments, 2006

Symphony and Broadway demographics fit with the firm's target demographic.

- Over 50% ages 35-64
- Over 80% college grads
- Over 50% have household incomes of \$100k+ and investable assets over \$250k

PUBLIC RELATIONS

Public relations strategy included engaging A-list celebrities to generate immense media coverage.

Celebrity Support



ELTON JOHN

Grammy, Academy, and Tony Award-winning Musician



QUEEN LATIFA

Musician, TV and film actress, has won Golden Globe and Grammy awards



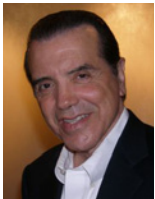
HILLARY SWANK

Two-time Academy Award-winning Actress



DAVID HYDE PIERCE

Emmy and Tony Award-winning Actor



CHAZZ PALMINTERI

Author and star of *A Bronx Tale*



CLAIRE DANES

Golden Globe and Emmy Award-winning Actress



JAMIE FOXX

Academy, Golden Globe and Grammy Award-winning Actor and Musician

OTHER CELEBRITIES

- Roger Bart
- Joan Cusack
- Joe DiPietro
- Charles S. Dutton
- Raúl Esparza
- Frankie Faison
- Peter Gallagher
- David Alan Grier
- David Henry Hwang
- Scarlett Johansson
- John Leguizamo
- Kathleen Marshall
- Lin-Manuel Miranda
- Jerry Mitchell
- Dominic Monaghan
- Liev Schreiber
- James Spader
- David Strathairn
- Richard Thomas
- Kerry Washington
- Michael Weller
- Jerry Zaks

TV & Radio



Print & Web



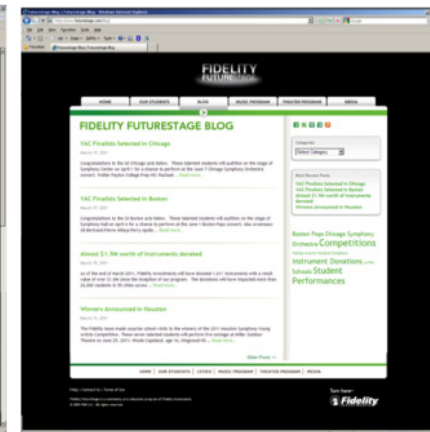
PROGRAM ELEMENTS

Surprise instrument donations and celebrity involvement created excitement and strong media attention. Student competition winners performed on stage with renowned symphony orchestras in front of live audiences, including Fidelity high net worth and institutional clients and employees in five major cities.



COMMUNICATION

Website included program information, blog, photos from events, media coverage.



COMMUNICATION

Created viral campaign to generate awareness and increase engagement.

eCard Website



Over 350,000 participants from 127 countries participated in holiday email campaign resulting in a 2,200%+ increased website traffic, social media activity and national media coverage, including being named the “site of the day” by Entertainment Weekly.

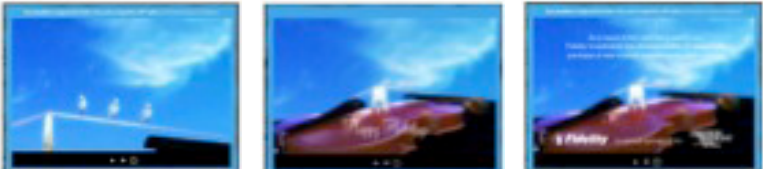


Fidelity Investments
Give the gift of music! Send a holiday ecard and we'll donate \$1 to school music programs <http://go.fidelity.com/card> Pls RT
1 Dec

eCard 1



eCard 2



eCard 3



eCard 4

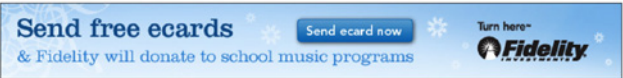


Fidelity Investments Free musical ecards are ready! For each one sent, Fidelity will donate \$1 to buy musical instruments for public schools. Go check them out. They're fun to watch and to hear!
<http://go.fidelity.com/ecards2010>



Spread holiday cheer & support music in schools
go.fidelity.com
Send free musical ecards to your friends and family. Every time you do, Fidelity Investments will donate \$1 to buy instruments for public schools. Free ecards feature music from the Boston Pops, Houston Symphony, Chicago Symphony Orchestra and Los Angeles Philharmonic.

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COMMUNICATION

Developed advertising campaign highlighting real student experiences.

"I think this was the **TURNING POINT** for me as a person and as an artist."

— Alan Gonzalez, age 18

Performing with the Houston Symphony, June 30, 2010



FIDELITY FUTURESTAGE.

Fidelity FutureStage® is an arts education program that provides critical resources and experiences to help make a difference in the lives of public school students.

www.futurestage.com

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"I learned to focus **MY ENERGY** on being the best I could be."

— Jules Levy, age 17

Renaissance Arts Academy performing at the Hollywood Bowl, June 18, 2010



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— Gustavo Hernandez, age 17

Gustavo performing with the Boston Pops, May 20, 2009



FIDELITY FUTURESTAGE.

DEFINING MOMENTS

Music has the power to transform young lives. The Fidelity FutureStage arts education program helps public school students achieve their potential on stage—and in life.

We congratulate the 2009 Music Competition winners for their extraordinary achievement. Their inspiring performances with the Boston Pops demonstrate how the arts can make a positive difference in the lives of young people.

Fidelity FutureStage is a community arts education program of Fidelity Investments. Fidelity FutureStage and Fidelity Investments and the Fidelity FutureStage logo are registered service marks of FMR LLC. © 2009 FMR LLC. All rights reserved.

2009 FIDELITY FUTURESTAGE MUSIC COMPETITION WINNERS

 Anjelique Perry Roland Hayes School	 Gustavo Hernandez Max Bailey, Chris Juno Boston Arts Academy	 Chris Middleton Boston Latin School	 B. Kim, Tashah Neely, Christopher Nguyen, Allyn Hayes McCune Boston Latin School
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The 2010 Music Competition winners will perform with the Boston Pops on May 26, 2010.

For more information on FutureStage, visit www.futurestage.com

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Fidelity INVESTMENTS

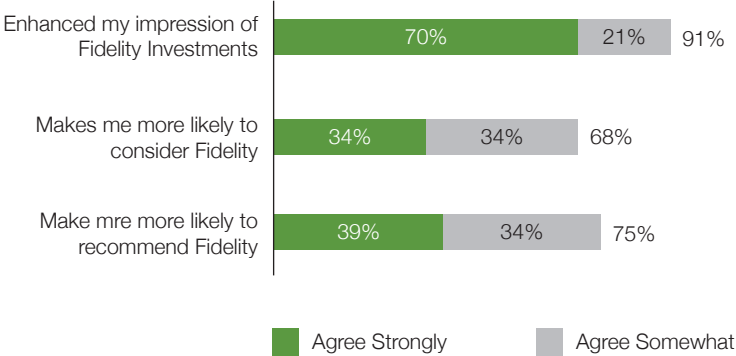
BOSTON POPS

RESULTS

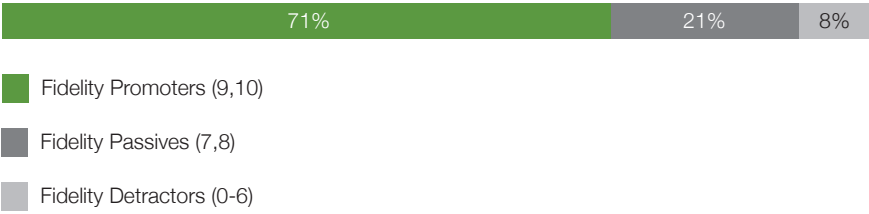
Feedback from clients and patrons attending a FutureStage event.

- Attendees of Finale events said the program greatly enhanced their overall impression of the firm
- NPS score of 63 is among the highest of our Fidelity customer segments

Fidelity FutureStage



NPS Score = 63



Differentiation From Other Financial Services Firms



"If a company takes time and resources to help our future generations that is a good indication for me."
-Fidelity client

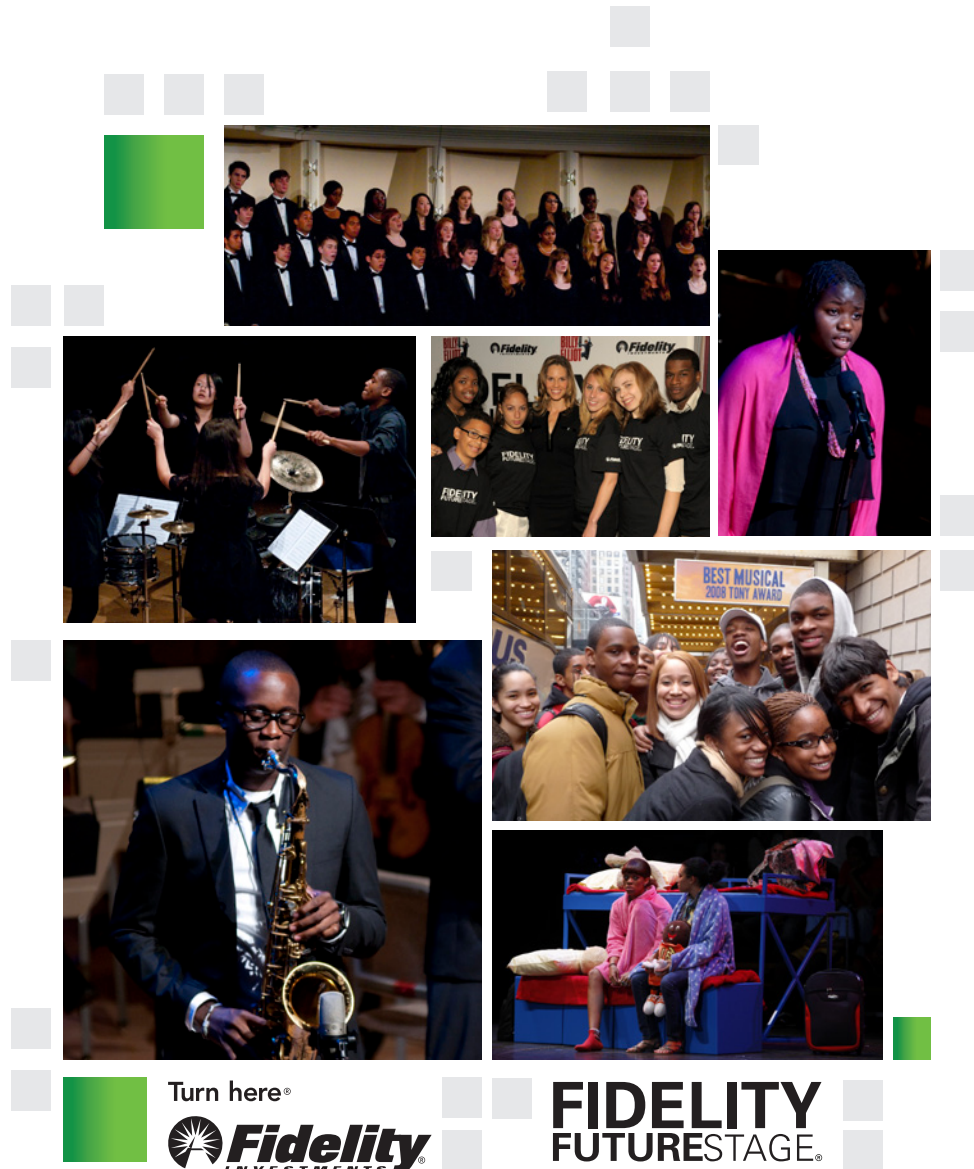
"It's a great way to inform future investors in what Fidelity is all about – much better than just TV advertisements."
-Fidelity client



"It's surreal
TO THINK

about what I have accomplished."

— B. Kim, age 15



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