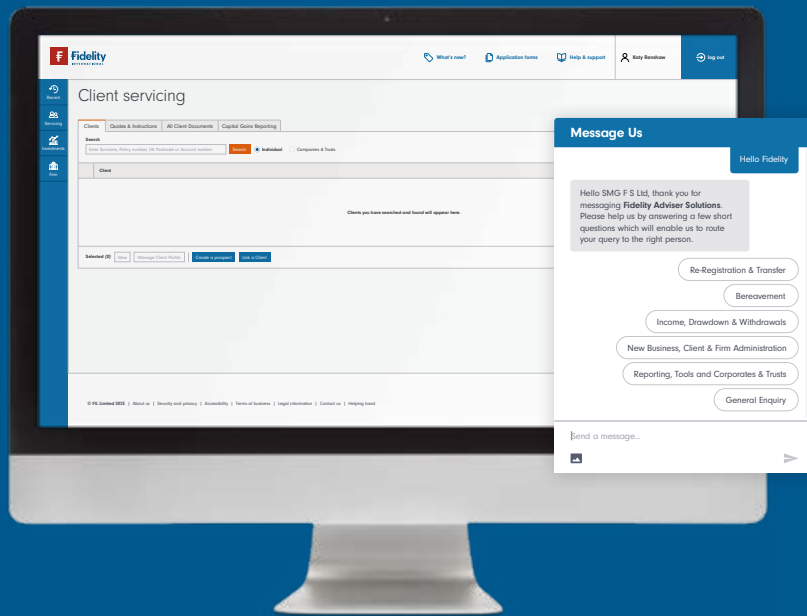


This document is for investment professionals only and should not be relied upon by private investors.

A new Web Messenger service

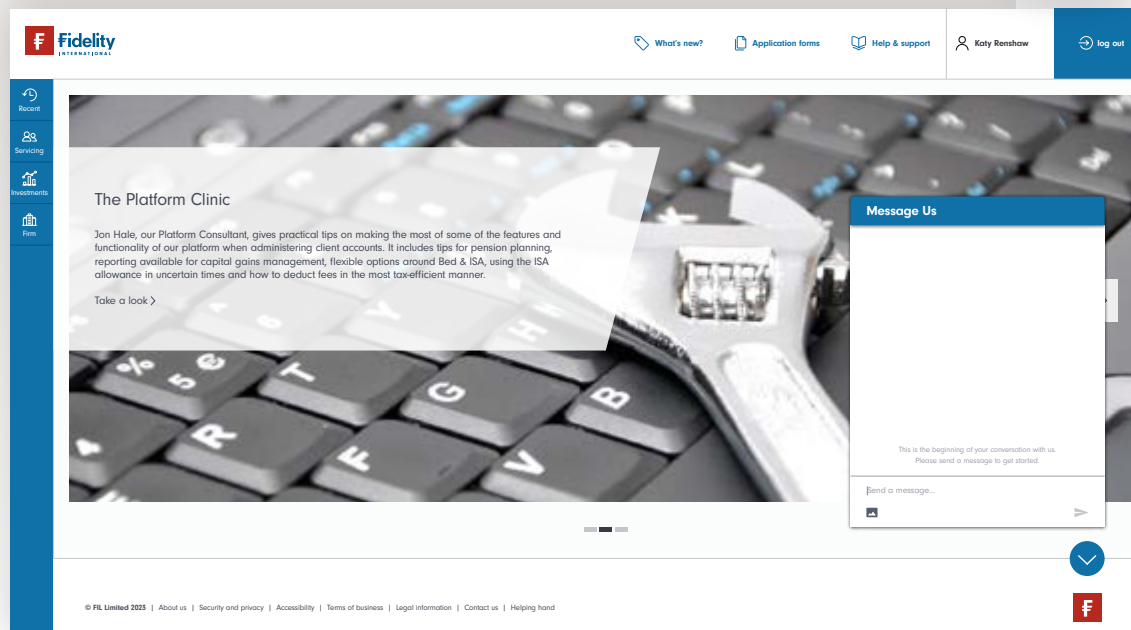
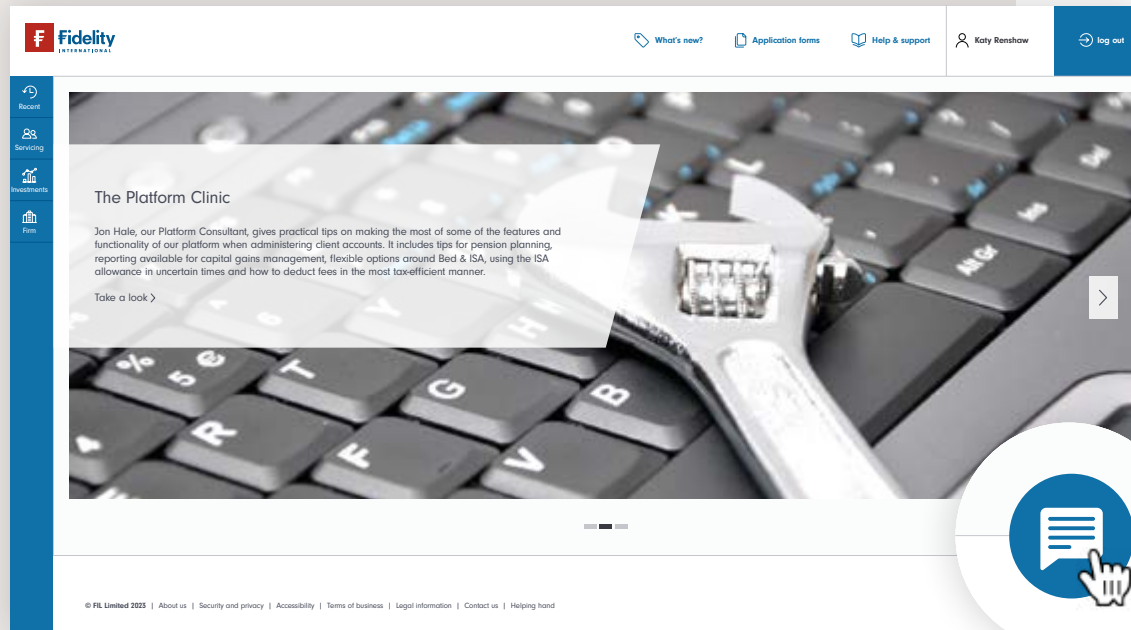
A new Web Messenger is being added to our website, to improve the service we offer you and provide you with another means of contacting us. This Q&A is intended to assist you with the changes.



Adviser Solutions



New Web Messenger service



Q. What is Web Messenger?

A. Web Messenger is an online messenger tool that allows you to contact our Client Services team directly from our website.

Q. Do I need to be logged into the platform to use Web Messenger?

A. Yes, the Web Messenger widget is only available to access, once you have logged into the platform and can be found in the bottom right-hand corner of the screen.

Q. Do I need to complete security questions to talk to you via Web Messenger?

A. No, as you have already logged into the platform to access the Web Messenger tool you have been authenticated and no additional security questions are required. The Client Services associate will be provided with your consultant ID and UAN automatically when you initiate a conversation.

Q. Can I message you about my clients' accounts?

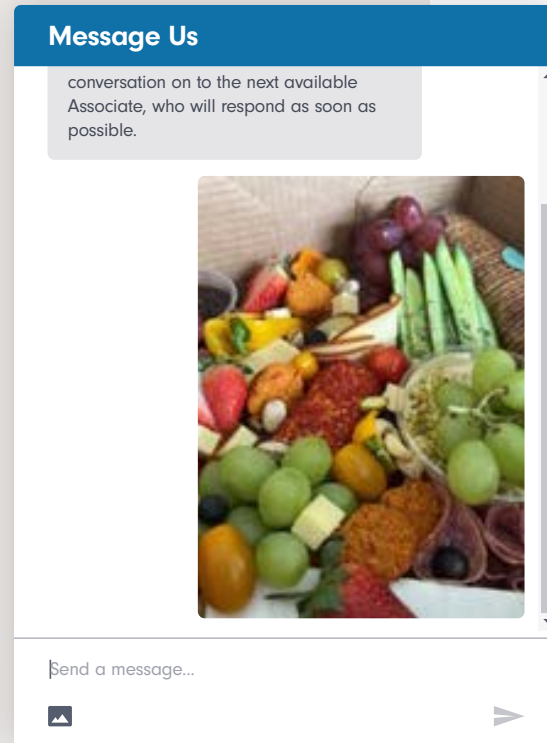
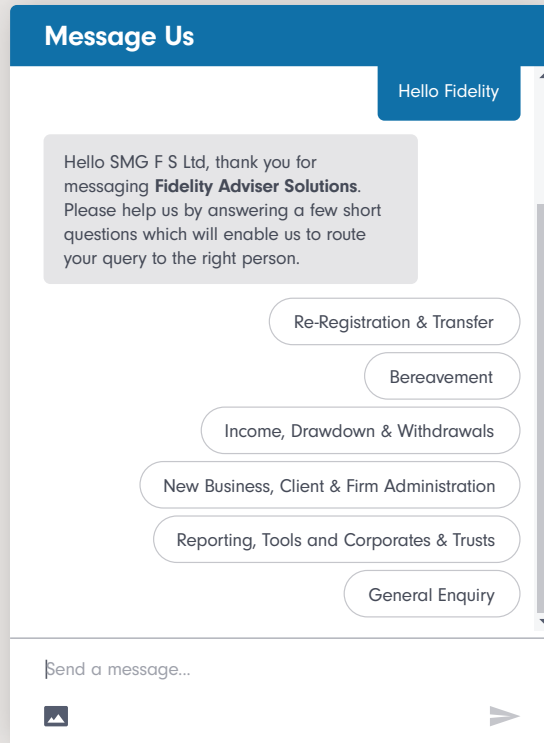
A. Absolutely, we are happy to help you with queries regarding your clients' accounts via Web Messenger.

Q. Can I use Web Messenger to ask for help regarding my business, reporting and online tools?

A. Yes, we would love to assist you via Web Messenger to help answer business queries.

Q. If I send you a query on Web Messenger how long will you take to respond?

A. We aim to respond to all initial queries within 5 minutes.



- Q.** How do I know my query will be directed to the right associate?
- A.** We will triage your query by asking you to select the topic which best describes your enquiry. From here our system will route your conversation to the associate with the most suitable skill set.
- Q.** If I send you a query on Web Messenger do I need to wait online for your response?
- A.** Web Messenger works in a similar way to Facebook Messenger or WhatsApp. You can send us a query when you are logged onto the platform, and we will respond as soon as possible. You are welcome to log off at any point and our response will be delivered to you when you next log in. You can resume the conversation where we left off.
- Q.** Is Web Messenger a text-only service?
- A.** Web Messenger supports both text and image sharing (JPG, GIF, TIF and PNG). Web Messenger does not currently support file sharing and should not be used as a replacement for upload & send.
- Q.** What is the size limit for a Web Messenger interaction?
- A.** Messenger limits an inbound message to 4,096 characters and image attachments to sizes not larger than 10MB.

Q. When should I use Web Messenger and when should I use phone or email?

A. Web Messenger is ideal tool to get answers for queries that are related to a particular client, account or web journey that come to mind when visiting our platform. Due to the nature of a messaging service we would recommend that you phone us if your query is urgent or deal critical.

Q. Is there an option for you to see my computer screen?

A. No, Web Messenger does not currently support a co-browse functionality. This is in the pipeline for 2025.

Q. How long can I view my previous messaging history?

A. Messaging history will be visible on the widget for 15 calendar days. Any conversations older than 15 days will no longer be visible on screen.

Q. Do you store my messaging history?

A. Yes, a record of all Web Messenger conversations is stored at Fidelity for training and monitoring purposes.

Q. Can I export my Web Messenger conversation history?

A. Web Messenger does not currently support an export function. However, should you wish to obtain a copy of the conversation, please let us know and we can send this over to you in PDF format.

Q. Can I use Web Messenger for support with online journeys and website navigation?

A. Yes, one of our associates will be able to help you navigate through an online journey.

Q. Will Web Messenger be available on all screens of your website?

A. Yes, the Web Messenger icon will be available across all pages of the platform to allow you to initiate a conversation at your convenience. Your conversation will continue as you navigate around the site. You can minimise the chat window at any time.

Note: The chat window will not work across multiple browser tabs or on pages that open in a separate pop-up window such as Help and Support.

