



**FOR IMMEDIATE RELEASE**

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**NATIONAL FINANCIAL<sup>®</sup> INTRODUCES COMPREHENSIVE  
MULTIMEDIA PORTAL FOR BROKERS AND ADVISORS**

**National Financial Broker & Advisor Center<sup>SM</sup> Provides Easy Access to More Than 100  
Timely Business Building and Training Resources Exclusively via the Streetscape<sup>®</sup> Workstation**

BOSTON, May 13, 2008 -- National Financial<sup>®</sup>, a Fidelity Investments company, today announced that it has launched the National Financial Broker & Advisor Center<sup>SM</sup> (“Broker & Advisor Center”), a comprehensive multimedia portal designed to provide brokers and advisors working on National Financial’s Streetscape<sup>®</sup> workstation exclusive access to a broad range of business building and training resources in one central location.

Aimed at providing resources that can assist brokers and advisors in their efforts to grow their books of business and broker/dealer firms to retain successful brokers, the innovative site is the latest enhancement to the Streetscape workstation and the newest component of the National Financial Broker and Advisor Development Program<sup>SM</sup>. As part of the Broker & Advisor Center, National Financial is making available a comprehensive communications program for broker/dealer firm clients.

The Broker & Advisor Center integrates more than 100 broker- and advisor-specific resources, including more than 30 multimedia pieces, such as on-demand education and training videos, informational podcasts and flash demos. Updated with resources that reflect timely market developments and industry trends, the portal also includes more than 40 continuing education (CE) modules<sup>1</sup> as well as numerous whitepapers and investor-level materials. Portions of the site are also customized, allowing brokers and advisors to see only the information and products related to their broker/dealer firm.

“Increasingly, brokers and advisors are hungry for more marketing and professional development support to help them grow their books of business,” said Sandy Metraux, executive vice president, Marketing, National Financial. “Exclusively through Streetscape, the Broker & Advisor Center consolidates numerous high quality resources that help brokers and advisors better service their investors and ultimately drive top-line growth.”

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<sup>1</sup> Provided by Forefield Inc. through an alliance with National Financial.

The Broker & Advisor Center combines the breadth of Fidelity's and National Financial's market expertise with the depth of leading third-party information providers:

- **Business Building:** An array of information on investment strategies, best practices, sales ideas and investor-marketing materials (e.g. third-party financial markets insights, access to investor research, etc.) designed to help strengthen brokers' client and prospect relations.
- **Products & Services:** Extensive product and service information (e.g. annuities, mutual funds, fixed income, Managed Account Solutions<sup>®</sup>, etc.) that is designed to help satisfy the diverse needs of investors and create new opportunities for brokers. This section is customized, allowing brokers and advisors to see only the information and products related to their broker/dealer firm.
- **Training & Knowledge:** Educational resources on investing, regulatory and legislative changes, and financial planning are designed to help brokers and advisors enhance their business knowledge. Offered through Forfield Inc., an alliance of National Financial's, brokers and advisors can access more than 40 CE credit modules via a seamless Web interface. This section also includes flexible online training programs and materials, enabling new and existing users to utilize National Financial's products and services more effectively in their practices.
- **Notices & News:** Allows brokers and advisors to stay informed with some of the latest industry alerts, announcements and investor communications from National Financial. The investor communications calendar provides users with a centralized look at the upcoming regulatory mailings from National Financial.

"More than ever our clients are looking not only for access to products and services that can help grow their businesses, but also for help in increasing the adoption rates amongst their brokers," said Anne Steer, executive vice president, Relationship Management, National Financial. "We continue to make significant investments in these areas, such as the Broker & Advisor Center and its related communications program, specifically designed to help put business-building tools directly in the hands of the 85,000 brokers and advisors using the National Financial platform."

### **Clearing Industry's First Turn-Key Communications Program**

As part of the Broker & Advisor Center, National Financial developed a turn-key, six-week communications program to help broker/dealer firms increase adoption and usage rates of the Web site amongst their brokers and advisors. The program includes a two-minute [multimedia demo](#) that shows the main features and capabilities of the site, interactive e-mails sent to brokers and advisors which highlight new product and service offerings, ready-to-use banner advertisements that firms can use on their own internal Web sites and more. Based on extensive usability testing of the site, firms that used the communications package represented 94 percent of the overall site visits.

### **About National Financial**

National Financial, a Fidelity Investments company, offers Integrated Brokerage Solutions® to over 330 clients ranging from retail broker/dealers to institutional investment firms. Collectively, there are over 85,000 brokers and advisors associated with National Financial correspondent broker-dealers. As of March 31, 2008, National Financial custodied \$671 billion in assets, representing 5.6 million accounts. Integrated Brokerage Solutions incorporates innovative technology, products and programs, supported by dedicated client service professionals and trusted industry alliances. This holistic, solutions-oriented approach is designed to help client firms attain competitive advantage by driving growth, creating efficiency and managing risk. For more information about National Financial and Integrated Brokerage Solutions, please visit [www.nationalfinancial.com](http://www.nationalfinancial.com).

### **About Fidelity Investments**

Fidelity Investments is one of the world's largest providers of financial services, with custodied assets of \$3.2 trillion, including managed assets of more than \$1.5 trillion as of March 31, 2008. Fidelity offers investment management, retirement planning, brokerage, and human resources and benefits outsourcing services to 24 million individuals and institutions as well as through 5,500 financial intermediary firms. The firm is the largest mutual fund company in the United States, the No. 1 provider of workplace retirement savings plans, the largest mutual fund supermarket and a leading online brokerage firm. For more information about Fidelity Investments, visit [www.fidelity.com](http://www.fidelity.com).

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