

Art Plus Technology sponsored competition gives top marks for Fidelity Income Management Account Statement

Fidelity Investments Wins 2006 Award for Customer Advocacy in Financial Communications

BOSTON, MA (May 1, 2006)—Art Plus Technology (APT) announced that the Income Management Account (IMA) Statement from Fidelity Investments has won the 2006 Insight Award for Customer Advocacy. The announcement was made at a special ceremony held during the Financial Communications Forum at the Harvard Club in Boston on April 24-25. Shari Gershenfeld, SVP, Product Development, Fidelity Personal Investments, accepted the award on behalf of the Fidelity delegation which attended the ceremony on April 25. In her remarks, Ms. Gershenfeld said “It is particularly meaningful to us at Fidelity to receive an award based on customer advocacy, since we strive to put the customer first in everything we do.”

APT launched the Insight Award competition earlier this year to recognize financial communications which proactively provide customers with information to make more informed choices. The Call for Entries invited the public to submit a nominating statement along with samples of the financial communications. The entries were forwarded to the following communications experts who had volunteered to judge the entries:

- Deborah Bosley, PhD, Director of the Center for Writing, Language, and Literacy, UNC Charlotte
- Lynette DeWitt, Senior Research Analyst, Financial Research Corporation
- Michael Ellison, Executive Vice President, Corporate Insight
- Brian Perlman, PhD, CFO, Mathew Greenwald & Associates
- Bill Wreaks, editor and publisher, The Journal of Financial Advertising and Marketing

The judges evaluated the submissions on the basis of the following criteria cited in the Call for Entries:

1. Simplifies complex data and concepts
2. Provides information in clear, simple language
3. Discloses fees fully and clearly
4. Volunteers information about other products and services, including from other companies
5. Provides or points to more information on a topic or issue
6. Represents a significant advance over current “best practices” in financial communications

At the awards ceremony Dr. Bosley quoted the summaries from her fellow judges. Said one: “Fidelity’s IMA is presented in conversational language. It is chock full of educational content, and repeatedly directs investors to sources of additional information. Investors are repeatedly directed to take action specific to their investments and goal-achievement, even with other firms.” Another judge noted: “The ability to examine asset withdrawal and asset allocation in the same program simultaneously is truly something that financial planning programs have not offered before. The focus on decumulation is something the industry truly needs.” A third summed up: “Fidelity understands what it means to be an advocate for a client—anticipating relevant questions before customers have to ask. Very nice!”

Elizabeth Gooding, CEO of APT, stated: “We established the Insight Awards to recognize the firms that are leading the way in customer advocacy. We believe you can do well by doing good.”

For more information on the Insight Awards program, visit www.InsightForums.com.

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