



# Fidelity Investments Benefits Administration

## Vendor Assessment

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13 pages





## Who Is This Vendor Assessment For?

NelsonHall's Benefits Administration vendor assessment for Fidelity is a comprehensive assessment of Fidelity's benefits administration offering and capabilities, designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of benefits administration and identifying vendor suitability for benefits administration RFPs
- Vendor marketing, sales, and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the benefits administration sector.



## Key Findings & Highlights

Fidelity Investments (Fidelity) is a financial services corporation, providing benefits administration services through its Workplace Investing business.

Fidelity's benefits administration offering includes DC administration, DB administration, stock plan administration, H&W administration, spending account administration, private healthcare exchange, retiree transition services.

Fidelity utilizes its proprietary technology to support its benefits administration offering, including NetBenefits for employees/participants and Plan Sponsor Webstation (PSW) for employers/plan sponsors.

In total, Fidelity has ~19,835 benefits administration clients, and serves ~24m participants.

## Scope of the Report

The report provides a comprehensive and objective analysis of Fidelity's benefits administration offering, capabilities, and market and financial strength, including:

- Identification of the company's strategy, emphasis, and new developments
- Analysis of the company's strengths, weaknesses, and outlook
- Revenue estimates
- Analysis of the profile of the company's customer base including the company's targeting strategy and examples of current contracts
- Analysis of the company's offerings and key service components
- Analysis of the company's delivery organization including the location of delivery locations.

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## Report Length

13 pages

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## Benefits Administration Vendor Assessments Also Available for:

ADP

Aon Hewitt

Capita

Empyrean

Mercer Australia

Mercer UK

Mercer US

Morneau Shepell

Secova

Willis Towers Watson

Xerox