Fidelity Viewpoints® Imarket Sense



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The latest headlines, the current market conditions, and what it all means for you.



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Power of Attorney

A legal document that gives someone else the authority to make decisions on your behalf



Living Will

A legal document expressing your wishes about medical treatment if you cannot make decisions for yourself



Last Will and Testament

A legal document communicating a person's final wishes about what should happen to their possessions when they die.



Living Trust

A legal document, or trust, created during a person's lifetime where a trustee is named, and given responsibility for managing that person's assets for the benefit of the eventual beneficiary



- 1. Cerulli, January 20, 2022: www.cerulli.com/press-releases/cerulli-anticipates-84-trillion-in-wealth-transfers-through-2045
- 2. Fidelity Viewpoints, November 2022: www.fidelity.com/viewpoints/wealth-management/estate-planning-made-easy
- 3. Fidelity Viewpoints, September 2023: www.fidelity.com/viewpoints/wealth-management/estate-planning-for-digital-assets

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Stock markets are volatile and can fluctuate significantly in response to company, industry, political, regulatory, market, or economic developments. Investing in stock involves risks, including the loss of principal.

Foreign markets can be more volatile than U.S. markets due to increased risks of adverse issuer, political, market, or economic developments, all of which are magnified in emerging markets. These risks are particularly significant for investments that focus on a single country or region.

Fixed income investments entail interest rate risk (as interest rates rise bond prices usually fall), the risk of issuer or counterparty default, issuer credit risk and inflation risk. Foreign securities are subject to interest rate, currency

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