

Nike Fidelity 401(k) BrokerageLink

NIKE'S FIDELITY 401(K)

BROKERAGELINK

ALLOWS 401(K) PLAN

PARTICIPANTS ACCESS

TO A WIDE RANGE OF

SELF-DIRECTED

INVESTMENT OPTIONS.

What are the benefits of Nike's Fidelity 401(k) BrokerageLink?

Some investors want access to a broader range of investments than those available as options in the plan. The BrokerageLink allows participants to link their 401(k) assets to a securities account and choose from a broader array of investment options.

Through the Fidelity BrokerageLink, you have access to specialty funds, Target-Date funds, ETFs, individual stocks, and other investments that may not be available within the standard plan options.

You may combine BrokerageLink investment options with the standard 401(k) investment options available in the plan, or choose to invest entirely through your BrokerageLink account.

The BrokerageLink is a very flexible option, with only a few restrictions (such as no option trading or shorts).

Who should consider using the BrokerageLink option?

Investors who want to invest in assets that are not available as investment options in the plan.

Sophisticated investors who have the time and resources to research and build their own investment portfolio or who want more day-to-day control over the investing process.

Investors who want to access particular funds or specialty investment vehicles that are not available as options in the plan.

Investors who are willing to pay a small fee to access additional investment options.

Arnerich Massena can help.

The Nike Fidelity BrokerageLink option allows you to build a more customized investment portfolio based on your goals and objectives. We can help you craft your portfolio to meet your situation. Our planners are in your corner; we have years of experience working with Nike executives and can help you explore options and find the best ways to make your Nike benefits work for you.

Contact us to learn more about how we may be able to help. Reach out to Ryland Moore at rmoore@am-a.com or 971.263.7860. We look forward to learning more about the legacy you want to create.

