Fidelity Institutional Asset Management (FIAM®)

Fidelity Institutional Asset Management is one of the largest investment management organizations serving the U.S. institutional marketplace.* It works with financial advisors and advisory firms, offering them resources to help investors plan and achieve their goals; it also works with institutions and consultants to meet their varying and custom investment needs. Fidelity Institutional Asset Management is a gateway to Fidelity's original insight and diverse investment capabilities across equity, fixed-income, high-income and global asset allocation.

Check the background of this firm on FINRA's BrokerCheck.

Financial Advisors

Investment professionals who work with individuals to help plan for a variety of investment needs and goals including: building portfolios for college or retirement; investing for multiple time horizons and managing client accounts for dynamic and evolving markets.

Registered Investment Advisors (RIAs)

Investment professionals who provide a highly personalized level of advice around investment management and wealth planning. Clients often include high net worth investors with complex financial portfolios.

Retirement Advisors

Investment professionals who specialize in Defined Contribution plans. These individuals work with plan sponsor clients to improve plan design, build investment menus that help improve overall plan success and ensure plan participants' retirement readiness.

Gatekeepers & Analysts

These investment professionals are often the decision makers for the investment lineup on mutual fund, retirement plan, and/or variable annuity platforms. Analysts are individuals at broker-dealers, insurance firms, or banks who perform investment analysis.

Institutional Investors

These individuals represent large defined benefit and defined contribution plan sponsors, endowments, foundations, family offices, corporations, or entities. They are looking for investment options and custom solutions to adequately fund investment and corporate retirement plans.

Consultants

Investment professionals who help plan sponsors improve participant outcomes and reduce fiduciary risk. They are responsible for choosing, monitoring, and analyzing options for retirement plan investment menus. They may also maintain recommended lists for their clients.

Liquidity Managers

These individuals are institutional clients, such as officers and finance professionals from the public and private sectors. They are responsible for managing and planning cash and collateral obligations and for reducing liquidity risk exposure.

Individual Investors

Individual account owners who want to learn more about our products and services.

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* More than $560 billion in assets under administration, which includes assets distributed through the FIAM business unit that may be managed by Fidelity affiliates or third parties.

Before investing have your client consider the funds' investment objectives, risks, charges, and expenses. Contact Fidelity for a prospectus or a summary prospectus, if available, containing this information. Have your client read it carefully.

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