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## **WOMEN INCREASINGLY VIEW COMPANY STOCK AS AN IMPORTANT PART OF THEIR BENEFITS PACKAGE AND FINANCIAL STRATEGY, FIDELITY SURVEY FINDS**

BOSTON, February 13, 2019 – Employers who are looking to attract and retain female employees should consider highlighting the role of company stock plans in their corporate benefits package, according to new research<sup>1</sup> from Fidelity Investments. The survey results found that nearly half (49 percent) of women indicated a company stock plan is an important benefit when considering taking a job at a new company, and more than half (52 percent) of women said that access to a company stock plan increases loyalty to their employer.

The findings are part of Fidelity’s biennial survey that examines the evolving role of company stock plans within the corporate benefits landscape. While traditional benefits such as a 401(k), health insurance and vacation time continue to be popular among surveyed employees, company stock plans are increasing in importance, especially among women.

According to the survey results, almost two-thirds of women (64 percent) felt that their company stock plan provided a sense of ownership in their organization, and 67 percent indicated they were very satisfied with their company’s stock plan. The research also found that 48 percent of women indicated they work harder knowing that their company stock plan will reward them for their company’s performance.

“While the overall labor market is extremely tight, the competition for top female performers is even more intense,” said Emily Cervino, Head of Thought Leadership, Stock Plan Services at Fidelity Investments. “Company stock plans have always been viewed as an important employee benefit, but they can be an even more strategic tool for employers looking to attract and retain strong female talent.”

## **Company Stock Programs Increasingly Seen as Financial Wellness Tool**

Fidelity also examined how employees are using company stock as part of their overall financial strategy, and found that more than two-thirds of respondents (67 percent) consider company stock as part of their long-term investment plan. Here are several key findings:

- Almost half of employees (47 percent) indicated they would prefer company stock over a cash award, an increase from 35 percent in 2016. When asked the main reason they prefer a company stock award over cash, 55 percent of employees indicated they feel their company stock will be worth more than if they invested a cash award.
- Employees are almost three times more likely to sell company stock than borrow against their 401(k) if they have sudden need for cash. Almost two-thirds (63 percent) of respondents indicated they would sell company stock to raise cash, versus 23 percent that would tap their retirement savings account.
- When asked how they feel their company stock will perform, nearly one-quarter (23 percent) of employees feel the value of their company stock will increase substantially in the next 1-3 years, a slight increase from 21 percent in 2016.
- Employees are holding company stock, but not too long. Over one-third (36 percent) of respondents held their stock between seven and 24 months before selling, an increase from 29 percent in 2016.

“The results of this year’s survey really underscore the fact that the role of company stock continues to evolve and increase in importance in the eyes of employees, as well as play an increasingly important role in employees’ overall financial wellness,” added Cervino.

### **About Fidelity Investments**

Fidelity’s mission is to inspire better futures and deliver better outcomes for the customers and businesses we serve. With assets under administration of \$6.7 trillion, including managed assets of \$2.4 trillion as of December 31, 2018, we focus on meeting the unique needs of a diverse set of customers: helping more than 28 million people invest their own life savings, 23,000 businesses manage employee benefit programs, as well as providing more than 13,000 financial advisory firms with investment and technology solutions to invest their own clients’ money. Privately held for more than 70 years, Fidelity employs more than 40,000 associates who are focused on the long-term success of our customers. For more information about Fidelity Investments, visit <https://www.fidelity.com/about>.

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<sup>1</sup> Survey conducted for Fidelity by CMI of 2,932 stock plan participants, both US (total: 1,448) and international (total: 1,484). CMI sent invitations and up to two reminders between March 15 and May 10, 2018. Surveys were collected through May 20, 2018.