Fidelity is Invested in California

Fidelity Investments has been helping Americans strengthen their financial well-being since its founding in 1946. As one of the largest mutual fund companies in the U.S., we have $18 trillion assets under administration[1] and $7.1 trillion in managed assets.[1]

Across the United States, we're the...

- #1 workplace retirement plan provider in the U.S.[2]
- #1 provider in IRAs[3]
- #1 health savings account (HSA) provider[4]

Nearly 1-in-5 Californians

have retirement, investment, or savings accounts with Fidelity

In California Fidelity...

- Serves **6.77 million** customers
- Help **4.60 million workers with $716 billion in assets save for retirement** with a 401(k) or other defined contribution plan
- Administers more than **$2.19 trillion** in total assets including $701 billion in discretionary assets

Locations

Fidelity serves its customers through **34 investor centers** across California.



Community impact

We ensure **657,700** K-12 underserved students are served with year-round financial education.

Fidelity Charitable, an independent public charity and the nation's largest grantmaker, helped California donors make over **297,000 grants** totaling more than **$2.5 billion** to 24,270 California based non-profits in 2025.

1. Fidelity 2025 Annual report
2. This statement is based on the results of two independent media surveys. Fidelity ranked first in DC assets under administration and participants as of December 31, 2023 in *Pensions & Investments**'* 2024 annual Defined Contribution Record Keepers Survey; and first in total recordkeeping assets and participants as of December 31, 2023, in *PLANSPONSOR's* 2024 annual Defined Contribution Recordkeeping Survey.
3. The Cerulli Report - U.S. Retirement Markets 2025, based on an industry survey of firms reporting total IRA assets administered as of Q2 2025.
4. Morningstar rated 10-11 retail HSA providers for two distinct use cases: HSAs as a spending account to cover current medical costs and HSAs as an investment account to save for future medical expenses. Results published in "2019-2024 Health Savings Account Landscape."

Unless otherwise stated, all data is as of December 2025, except % of population, which is as of 2024 due to U.S. Census availability.

Fidelity Charitable is the brand name for Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. The Fidelity Charitable name and logo, and Fidelity are registered service marks of FMR LLC, used by Fidelity Charitable under license.

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Fidelity INVESTMENTS