



FOR IMMEDIATE RELEASE

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**NATIONAL FINANCIAL TO OFFER RESIDENTIAL MORTGAGE
AND HOME EQUITY PRODUCTS THROUGH EVERBANK**

**Addition of Eight New Members Strengthens Alliance Program
to Help Brokers Drive Growth, Create Efficiency and Manage Risk**

BOSTON, August 1, 2007 -- National Financial, a Fidelity Investments[®] company, today announced it has strengthened its alliance program with the addition of eight firms, including EverBank[®] Advisor Services¹, one of the nation's largest privately held banks. Through EverBank, broker/dealers and their brokers are now able to access a selection of residential mortgage and home equity products.

EverBank is the first residential mortgage and lending member in National Financial's alliance program. The other new members in the alliance program include Beacon Research; BenefitProtect; Fixed Income Securities, LP; Forefield Inc.; NetWorth Services, Inc.; thinkorswim, inc. and Seabury & Smith, Inc.

"We have forged alliances with some of the most well-known organizations in the financial industry, providing broker/dealers a single point-of-access to a variety of technologies, resources and services designed to help them drive growth, create efficiency and manage risk," said Jody Meth, executive vice president of product management and development for National Financial. "National Financial's alliance program enables broker/dealers to select a provider that we believe offers a best-of-breed solution and meets the growing needs of our clients."

National Financial's alliance providers are selected through comprehensive and extensive processes in an effort to identify those firms that are dedicated to a long-term relationship with National Financial and, therefore, committed to providing its clients added value through systems integration, continuous maintenance and ongoing enhancements.

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¹ EverBank[®] is an Equal Housing Lender and a FDIC-insured federal savings association (FDIC Certificate #34775).

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New Residential Lending Solution

National Financial's clients now have the opportunity to provide their customers with EverBank's mortgage and home equity products, including fixed and adjustable rate mortgages, interest-only mortgages, construction-to-permanent mortgages, home equity lines of credit and home equity loans. Available through a single sign-on connection from its Streetscape® workstation, brokers can apply online for products and work directly with a dedicated EverBank loan specialist on behalf of the end customer.

“When helping manage liabilities, particularly in the high-end practice, brokers are able to gain a better understanding of a client's total financial picture,” said Meth. “Through our alliance with EverBank, we are providing our broker/dealer clients access to a much needed competitive resource – one that can help them better meet the individual product needs of their customers, and strengthen client relationships which often lead to a higher level of referrals.”

“We are excited to be working closely with National Financial to develop a joint solution for their broker/dealer clients which leverages our mortgage banking experience,” said David L. Conover, senior vice president, EverBank Advisor Services. “EverBank's offering uniquely positions brokers to help their clients with mortgage and home lending needs based on the brokers' existing insight into a client's overall financial picture.”

Expanded Alliance Program Offers Broker/Dealers Best-in-Class Solutions

In addition to EverBank, National Financial announced that seven additional companies have joined its alliance program, providing broker/dealers and their brokers access to an expanding array of products and services designed to help them better service their customers and grow their business. Firms include:

- **Beacon Research:** provides fixed-rate tax-deferred annuity research. This data is accessed with Beacon's product comparison/selection software to support analysis, sales, rate tracking and competitive monitoring.
- **BenefitProtect:** provides access to health insurance for broker/dealers and independent reps, including employees and families.
- **Fixed Income Securities, LP (FIS):** comprehensive fixed income resource and investment solutions provider for broker/dealers and advisors that helps build relationships with end investors.
- **Forefield Inc.:** a provider of current, concise and NASD filed presentations, newsletters and seminars for financial institutions and advisors.

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- **NetWorth Services, Inc.:** through its proprietary software NetBasis, NetWorth Services helps firms calculate an adjusted cost basis for investments going back to 1925, regardless of its history of capital changes.
- **Seabury & Smith, Inc.** (part of the Marsh & McLennan family of companies): provides insurance solutions specifically tailored to the needs of broker/dealer firms. Through relationships with dozens of insurance companies, Seabury & Smith can arrange competitive premiums for Fidelity Bonds, Professional Liability Insurance, First- and Third-Party ERISA Bonds, Signature Guarantee Medallion Bond coverage and others.
- **thinkorswim, inc.:** offers, thinklink, an equity order management system for broker/dealers. thinklink allows traders to receive, work and report orders and executions more efficiently.

Separate from its alliance program, National Financial has established a relationship with Daylight Forensic & Advisory LLC to provide clients access to its services at a discounted rate. Daylight Forensic & Advisory is an international regulatory consulting and investigative firm specializing in financial investigations and forensic accounting.

National Financial now offers its nearly 340 broker/dealer clients and their more than 86,000 brokers access to numerous alliance firms providing a wide range of services including wealth management solutions, investment analysis, research and performance measurement tools, electronic trading platforms, market data and reporting and compliance tools.

About National Financial

National Financial, a Fidelity Investments company, offers Integrated Brokerage Solutions® to nearly 340 clients ranging from retail broker/dealers to institutional investment firms. Collectively, National Financial's clients have more than 86,000 brokers. As of June 30, 2007, National Financial custodied over \$693 billion in assets representing more than 5.5 million customer accounts. Integrated Brokerage Solutions incorporates innovative technology, products and programs, supported by dedicated client service professionals and trusted industry partners. This holistic, solutions-oriented approach is designed to help client firms attain competitive advantage by driving growth, creating efficiency and managing risk. For more information about National Financial and Integrated Brokerage Solutions, please visit www.nationalfinancial.com.

About Fidelity Investments

Fidelity Investments is one of the world's largest providers of financial services, with custodied assets of \$3.2 trillion, including managed assets of \$1.5 trillion as of June 30, 2007. Fidelity offers investment management, retirement planning, brokerage, and human resources and benefits outsourcing services to more than 23 million individuals and institutions as well as through 5,500 financial intermediary firms. The firm is the largest mutual fund company in the United States, the No. 1 provider of workplace retirement savings plans, the largest mutual fund supermarket and a leading online brokerage firm. For more information about Fidelity Investments, visit www.fidelity.com.

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