RETIREMENT READINESS & PLANNING

FINANCIAL BASICS

TOOLS & RESOURCES

VIRTUAL KNOWLEDGE CENTER

Financial Planning Resources Guide for Your Benefit

RETIREMENT DECISION GUIDE - Getting ready for life after work can be exciting but requires many decisions. If you're not sure where to start, or want help understanding options for health coverage, estimating expenses in retirement, and prioritizing decisions, our Retirement Decision Guide can help you plan for the retirement you want.

ARE YOU EMOTIONALLY READY TO RETIRE? - Thinking about retirement? Have you considered how you feel about retirement? *Are You Emotionally Ready to Retire?*—we explore ways to prepare yourself emotionally and mentally for when the big day arrives.

SOCIAL SECURITY CALCULATOR - Use Fidelity's calculator to decide when to start claiming your Social Security retirement benefit.

PRESERVING YOUR SAVINGS FOR FUTURE GENERATIONS - This workshop will help you get a general understanding of what assets are potentially taxable and how they might be distributed. Learn the importance of a living will and health care proxy, as well as the basics of trusts, gifting, and possible insurance replacement strategies.*

**Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.*

HOW YOU MONEY - Not everyone's a money expert. That's okay. That's why Fidelity created "How You Money", a group of videos made to help you tackle all your money questions. Pick yours: savings, investing, debt, fundamentals, retirement and more.

FINANCIAL WELLNESS CHECKUP - Your personal financial wellness score.

7 CREDIT CARD TIPS - Make credit cards work for you by maximizing rewards while avoiding debt.

MANAGING MY MONEY - Identify the three core components of a sound budget.

FIDELITY SMART MONEY℠ - Find out what the news means for your money, plus tips to help you spend, save, and invest better—delivered to your inbox every week.

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POWER OF SMALL AMOUNTS - Contribution tool.

PLANNING SUMMARY - Your one-stop destination to help you stay on top of your financial wellness needs. With it you can view your financial picture in one place, manage your finances by tracking your spending and debt, create savings goals that matter the most to you—like retirement, education, and emergency savings—and build a plan to help reach them.

STUDENT LOAN DEBT - Fidelity's student debt tool.

TAKE-HOME PAY CALCULATOR - See how your pre-tax contributions might affect your take home pay.

BUDGET CHECK-UP - See how your budget stacks up to our 50/15/5 guide.

TOOLS & RESOURCES

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FINANCIAL WELLNESS HUB - Helpful resources to navigate life's moment– beyond just retirement.

LEARN HUB - Get answers to your financial questions.

WEBCAST HUB - Engaging conversations on a wide range of financial topics, available anytime.

Investing involves risk, including the risk of loss.

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