There are several ways to work with Fidelity.

Which way works best for you?

I would like to…	Available online at **NetBenefits.com** or by calling **800-343-0860**	Talk to a phone-based Retirement Planner at **866-715-5959**	Visit a Fidelity Investor Center **Fidelity.com/ branchlocator**
Enroll in the Trinity Health Plan	✓		
Learn the basics about the Plan	✓		
Check account balances	✓		
Request fund exchanges	✓		
Use interactive planning tools	✓	✓	
Request a form	✓		
Ask general questions	✓		
Discuss Social Security and or Medicare		✓	✓
Find fund performance	✓		
Obtain the Plan enrollment guide	✓		
Develop a comprehensive investment strategy		✓	✓
*Learn more about consolidating retirement plan accounts	✓	✓	✓
Learn about distribution options		✓	✓
Get help with retirement income planning		✓	✓
Change my voluntary retirement savings contribution amount	✓	✓	
Explore retirement savings opportunities outside of the Trinity Health Plan		✓	✓
Learn about investment products and services beyond my Trinity Health Plan		✓	✓
Get help with estate planning and college savings strategies, establishing a trust account, and other advanced financial needs		✓	✓

*Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

For a complimentary phone consultation, please call **866-715-5959.**

A phone-based **Fidelity Retirement Planner** can help with the following items from the start of your career until you approach retirement:

Getting Started

- Create a budget
- Student loans/ Paying down debt
- Understanding your plan
- Choosing your investment mix

Mid-Career

- Saving for a dependent's college
- Maximizing your employer's matching contributions

Pre-Retirement Planning

- Retirement Income Planning
- Social Security analysis
- Medicare

Planning to call a phone-based Retirement Planner?

You may want to consider having some materials with you. These are not required – they can only make the time more valuable.

- Any relevant account statements
- Username and Passwords
- Beneficiary names DOB and social security numbers (If not established)
- Social Security Statement (if retiring soon)
- Approximate monthly expenses

Meetings can last 10 minutes or an hour – whatever agrees with your schedule and financial needs. We encourage you to include your spouse, family member, or loved one in the conversation.

Want to get help **on-demand**? Fidelity has resources at the ready.

Visit the Webcast Hub

Enjoy practical conversations to help you live well financially, today and tomorrow on such topics as:

- Saving & Investing
- Preparing for Retirement
- Managing Life

See what's upcoming and watch previously recorded shows at **Fidelity.com/webcasts.**

Join Fidelity for a complimentary workshop.

Choose from our library of pre-recorded, on-demand workshops so you can learn online – on your own time.

Or, for a more interactive experience, reserve your spot for a Live Web Workshop. These live, presenter-led workshops are offered each month, presented by a Virtual Education Consultant, and are easy to attend right from your computer.

e-learning.fidelity.com

Fidelity INVESTMENTS

Investing involves risk, including risk of loss.