

## There are several ways to work with Fidelity. Which way works best for you?

<i>I would like to...</i>	Available online at <b><u>NetBenefits.com/ut</u></b> or by calling <b>800-343-0860</b>	Talk to a Fidelity Workplace Financial Consultant <b><u>Fidelity.com/schedule</u></b>	Visit a Fidelity Investor Center <b><u>Fidelity.com/ branchlocator</u></b>
Enroll in the University of Texas Retirement 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	✓	✓	
Walk in for immediate help			✓
Explore retirement savings opportunities outside of my University of Texas Retirement Plan		✓	✓
Learn about investment products and services beyond my University of Texas Retirement 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.

To schedule your confidential consultation, visit [Fidelity.com/schedule](https://www.fidelity.com/schedule).

A **Fidelity Workplace Financial Consultant** 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

#### Have an appointment with a Fidelity Workplace Financial Consultant?

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

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](https://www.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](https://e-learning.fidelity.com)



Investing involves risk, including risk of loss.

Investor Center products and services are offered beyond those of your employer-sponsored retirement plan.

Fidelity Brokerage Services LLC, Member NYSE, [SIPC](https://www.sipc.org), 900 Salem Street Smithfield, RI 02917

© 2020 – 21 FMR LLC. All rights reserved.

878117.5.2