THE UNIVERSITY of TEXAS SYSTEM
RETIREMENT PROGRAM
Your Future. Your Choice.

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

I would like to...	Available online at **NetBenefits.com/ut** or by calling **800-343-0860**	Talk to a Fidelity Workplace Financial Consultant **Fidelity.com/Schedule**	Visit a Fidelity Investor Center **Fidelity.com/ branchlocator**
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, please call **800-642-7131** or visit **Fidelity.com/schedule**.

Your **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 to meet with your Workplace Financial Consultant?

You may want to consider bringing 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

Fidelity.com/Schedule

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

Get help with your money goals

Fidelity's financial wellness checkup can help you understand what's going well and what else you can do to work toward your money goals. Get a look into how you're doing and find tips that can help you move forward.

NetBenefits.com/financialwellness

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

Investing involves risk, including risk of loss.

Fidelity retail products and services are offered beyond those of your employer-sponsored retirement plan.