

Fidelity Investments Resource Guide



Overview

Welcome to your comprehensive guide to planning for a secure and fulfilling retirement! Trinity Health has partnered with Fidelity Investments to provide you with the best tools and resources to help you navigate your retirement journey.

Telephone Resources

Account access and service: 800-343-0860
On-Demand Retirement Planners: 800-642-7131

Summary Plan Descriptions

Access your Summary Plan Description:
<https://nb.fidelity.com/public/nb/default/home?option=YourCompanyPlan>

Online Resources

Log into NetBenefits to manage your account:
www.netbenefits.com
[NetBenefits.com Accessibility Information](#)
Learn more about all the ways Fidelity can help you with your financial planning and contact a Financial Planner:www.fidelity.com/ask

Resources for Pre-Retirees

Retirement Decision Guide:
<https://digital.fidelity.com/stgw/digital/planning/retirement/retirement-decision-guide/entry/v2/dashboard-lite>
Retirement Income Calculator:
<https://digital.fidelity.com/stgw/digital/planning/retirement/retirement-income-calculator/>

Learning Hub and Planning Resources

Fidelity offers a wealth of resources to help you manage your finances and plan for the future. From insightful articles and engaging videos to informative podcasts and handy calculators, there's something for everyone.

Please note, you may need to sign into your [Fidelity NetBenefits](#) account to access some of these resources. See the next page for a table of links to some of our favorite tools. Happy exploring!

College Savings Calculator	https://www.fidelity.com/misc/college-savings/college_savings.html
Considering a Retirement Plan Loan	https://www.brainshark.com/fidelityemg/planloans
Contribution Maximizer	https://contributionmaximizer.com/
Contribution Calculator	https://nb.fidelity.com/public/nb/default/home?option=ContributionCalculator
Check your Vitals	https://communications.fidelity.com/tem/check-your-vitals/
Estate Planning Action Center	https://www.fidelity.com/estate-planning-inheritance/estate-planning/overview
Fidelity Retirement Score	http://personal.fidelity.com/planning/retirement/content/myPlan/index.shtml
Financial Wellness Checkup	Text <i>fit</i> to 343-898
Planning Summary	https://nb.fidelity.com/public/nb/default/home?option=planningSummary
Power of Small Amounts Tool	https://communications.fidelity.com/wi/powerofsmallamounts/#/start
Roth Contribution Modeler	https://workplaceservices.fidelity.com/#/rothmodeler
Savings & Spending Checkup	https://communications.fidelity.com/wi/2015/savingsandspendingcheckup/
Student Debt Tool	https://myguidance.fidelity.com/ftgw/pna/public/pgc/student-debt/# Or Text <i>studentdebt</i> to 343-898
Take Home Pay Calculator	https://workplaceservices.fidelity.com/mybenefits/employerservices/app/tools/dc/calculators/takehomepay
When to Claim Social Security	https://digital.fidelity.com/stgw/digital/planning/retirement/guided-retirement-path/social-security?poe=nb&client=000138052
Women Talk Money	https://fidelityevents.com/women-talk-money-events?ccsource=WTM_landing