

Fidelity Investments

Retirement Planning Resource Guide

9-2-2020



Overview

Trinity Health has partnered with Fidelity Investments to provide colleagues with tools and resources to help plan for retirement. This document provides information about some of the Fidelity resources.

- [Ways to Work with Fidelity](#)

Telephone Resources

Account access – 800-343-0860

Retirement Planners – 800-642-7131

Online Resources

Account access log in – www.netbenefits.com

- [How to Access Your Online Account](#)

Retirement Planners - www.fidelity.com/ask

Plan Highlights

- Trinity Health 403(b) Retirement Savings Plan – 76301 <https://www.planhighlights.com/faq/76301>
- Trinity Health 401(k) Retirement Savings Plan - 76302 <https://www.planhighlights.com/faq/76302>
- Burdett Care Center, Inc. 403(b) Retirement Savings Plan – 76303 <https://www.planhighlights.com/faq/76303>

Library & Planning Resources – Fidelity provides access to articles, videos, podcasts, calculators, planning tools and more! Below are links to some of the most popular resources. Note: you may be required to sign into your Fidelity NetBenefits account to access some of these resources.

Bridging the Gap for Medicare	https://pages.fidelityinvestments.com/Pre-65-Decision-Support/
College Savings Calculator	https://www.fidelity.com/mymoneyfirsts/savingforcollege.html

Considering a Workplace Loan	https://www.fidelity.com/loandecision/?cmp=alt
Contribution Calculator	https://nb.fidelity.com/public/nb/401k/tools/calculators/contributioncalculator
457(b) Contribution Calculator	https://workplaceservices.fidelity.com/static/common/html/Calculators/457/457salarydeferralpage1.html
Estate Planning Action Center	https://www.fidelity.com/estate-planning-inheritance/estate-planning/overview
Full View	https://www.fidelity.com/cash-management/full-view/overview
Minimum Required Distribution Calculator	https://gpi.fidelity.com/ftgw/interfaces/rmd#/rmdform
MyMoney Checkup	Text fit to 343-898
For nurses	www.fidelity.com/nurses
For physicians	www.fidelity.com/physicians
Planning & Guidance Center	https://nb.fidelity.com/public/nb/default/home?option=nglAPlanning
Power of Small Amounts	https://communications.fidelity.com/wi/powerofsmallamounts/#/start
Retirement Score	Text score to 343-898
Roth Contribution Calculator	https://workplaceservices.fidelity.com/mybenefits/employerservices/navigation/librarisublanding?page=byFormat/tools_calculators#
Savings & Spending Check-up	https://communications.fidelity.com/wi/2015/savingsandspendingcheckup/
Student Debt	https://myguidance.fidelity.com/ftgw/pna/public/pgc/student-debt/# or text studentdebt to 343-898
Take Home Pay Calculator	https://workplaceservices.fidelity.com/mybenefits/employerservices/app/tools/dc/calculators/takehomepay
The Fidelity Retirement Score	http://personal.fidelity.com/planning/retirement/content/myPlan/index.shtml
Take Home Pay Calculator	https://nb.fidelity.com/public/nb/401k/tools/calculators/takehomepay
When to Claim Social Security	https://www.fidelity.com/mymoneylifestyle/social-security/#/start
Women Investors	www.fidelity.com/demandmore or text demandmore to 343-898
Your Contribution Maximizer	http://www.contributionmaximizer.com/

Resources for New Hires

<p>New hire retirement savings orientation video – long version – 27 min</p> <p>https://www.brainshark.com/fidelityemg/TrinityHealth h</p> <ul style="list-style-type: none">• PDF	<p>New hire retirement savings orientation video – short version – 10 min.</p> <p>https://www.brainshark.com/fidelityemg/TrinityHealthSP20 20</p> <ul style="list-style-type: none">• PDF
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