Now that you’ve taken the important first step of scheduling an appointment with a Fidelity Workplace Planning and Guidance Consultant, make the most of your appointment by being prepared when you walk in the door. Though your first meeting may be more about getting to know your consultant and defining your financial goals, it’s important for your Planning and Guidance Consultant to be able to understand your current financial situation.

The following is a list of information that would be beneficial for you to have on-hand for your first meeting:

- Recent statements from any banking and/or investment accounts (i.e., checking, savings, retirement accounts, etc.)
- A printed copy of your UCRP pension amount at your estimated retirement date, available at www.atyourserviceonline.ucop.edu or your UC Retirement Savings Program statements
- Any non-UC pension estimates
- Monthly budget, including loan or debt information
- Spouse’s/partner’s information (if it should be included in your planning)

In addition to financial information, consider bringing a list of specific questions you’d like answered.

During your appointment, you may also log into NetBenefits to review your personal information and use some of the site’s planning tools, so be sure you know your Username and Password.

Doing some of this prep work up front will allow you and your Fidelity Workplace Planning and Guidance Consultant to make the best use of your time together.

Keep in mind that investing involves risk. The value of your investment will fluctuate over time, and you may gain or lose money.

Although consultations are one-on-one, guidance provided by Fidelity is educational in nature and is not intended to serve as the primary or sole basis of a participant’s investment or tax-planning decision.

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