Meet with your U of M Fidelity Workplace Financial Consultants

Your University of Michigan retirement benefits offer opportunities to save through three plans aligned with Fidelity Investments:

- The U-M Basic Retirement Plan
- The 403(b) SRA Plan
- The 457(b) Deferred Compensation Plan

U-M works with a dedicated team of Fidelity specialists to offer education about these plans and additional financial matters. Fidelity is well-versed in all aspects of U-M's retirement savings plans.

Fidelity can help you:

- ✓ Review your overall retirement savings portfolio to maximize the U-M Plans.
- ✓ Evaluate your investment choices and asset allocation to develop a comprehensive investment strategy for you.
- ✓ Discuss strategies to protect your assets and future income.
- ✓ Determine if you are on track to meet your retirement goals or help you establish your goals.
- ✓ Consolidate retirement plan accounts into your U-M Plan.

Meeting with Fidelity is completely complimentary and included as part of your U-M Plan Benefits. Meet with us by phone, in-person, or through video conference.

[Schedule your Complimentary Appointment online today!] Or call 800-642-7131.

Any and all correspondence to Fidelity, including transfers of assets from TIAA to Fidelity should be sent to: Fidelity Investments, PO Box 770002, Cincinnati, OH 45277-0090.