Resources available from Fidelity

We can help your employees plan for today — and tomorrow.

As your Fidelity Workplace Financial Consultants dedicated to Purdue Institutions, we can offer the following support to provide continued help around your employees' financial wellness and retirement planning:

Departmental Meetings:

- Participants have told us they find these more intimate sessions very valuable. It's an opportunity to get together at a time that works for you.
- Often attendees are more engaged and feel more comfortable asking questions.
- We would be happy to attend a regularly scheduled staff meeting or provide a quick overview of the retirement plans at another time.

One-on-One appointments:

By taking time to know your employees and their personal priorities, we can help them:

- Maximize the potential of their savings at work
- Review investment choices
- Review options for a former employer's accounts
- Develop a plan with simple steps they can act on right away

Please feel free to reach out to Jason or Andy directly via e-mail if you are interested in any of these types of meetings within your department.

Contact us to

Schedule your Department Meeting

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Investing involves risk, including risk of loss.

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