

Banner Health Retirement Readiness

Creating a Path...

STOP 1

Ages 50-54

Gauge Your Retirement Readiness

STOP 2

Ages 55-59

Plan for Social Security

STOP 3

Ages 60-64

Get a Handle on Health Care Expenses

STOP 4

Ages 65-69

Turn Your Retirement Savings into Income

STOP 5

Age 70 and beyond

Help for Continuing Your Journey

To a More Secure Retirement



STOP 1

Ages 50-54

Gauge Your
Retirement
Readiness

Make an honest
assessment here to
help identify which
path to take.



RETIREMENT DECISION GUIDE



PLANNING YOUR RETIREMENT



5 WAYS TO HELP PROTECT
RETIREMENT INCOME

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STOP 2

Ages 55-59

Plan for
Social
Security

Let Fidelity help make it easy to sort through your Social Security options when you're ready to claim your benefits.



TRY FIDELITY'S SOCIAL SECURITY TOOL



VIEW *LEARN THE BASICS OF HOW & WHEN TO CLAIM SOCIAL SECURITY* WORKSHOP



RECEIVE AN ESTIMATE OF YOUR SOCIAL SECURITY BENEFIT OR BEGIN YOUR CLAIM

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STOP 3

Ages 60-64

Get a Handle
on Health Care
Expenses

Start putting
together a plan for
your unique health
care needs when
you retire.



***VIEW PREPARE FOR THE REALITY OF
HEALTH CARE IN RETIREMENT WORKSHOP***



HOW MUCH WILL HEALTH CARE COST?



SIX KEY MEDICARE QUESTIONS



BRIDGING THE GAP TO MEDICARE

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STOP 4

Ages 65-69

Turn Your
Retirement Savings
into Income

Learn how retirement savings from your 401(k) plan, pension, Social Security, and Individual Retirement Account (IRA) can be turned into retirement income.



VIEW *TURN YOUR SAVINGS INTO RETIREMENT INCOME* WORKSHOP



GET YOUR FIDELITY RETIREMENT SCORE



USE FIDELITY'S PLANNING AND GUIDANCE TOOLS

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STOP 5

Age 70 and beyond

Help for
Continuing
Your Journey

Explore options
for preserving
your savings for
future generations
and learn about
Required Minimum
Distributions.



***VIEW PRESERVING SAVINGS FOR FUTURE
GENERATIONS WORKSHOP***



MANAGING ESTATE PLANNING



**WHAT YOU NEED TO KNOW ABOUT
REQUIRED MINIMUM DISTRIBUTIONS**

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Don't Go It Alone

Let Fidelity serve
as your trusted
collaborator,
providing you
with guidance
and support
to help put you
on a path to
a more secure
financial future.

Investing involves risk, including the risk of loss.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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