

# One-on-one Counseling from a Fidelity Workplace Financial Consultant



## WE CAN HELP MAKE YOUR FINANCIAL GOALS POSSIBLE

As an employee of the University of California, you know firsthand the power of learning something new. And we're here to help you discover new ways to think about your financial future.

Rand Erickson, your UC-dedicated Fidelity Workplace Financial Consultant, is ready to help you with:

- **Understanding your retirement benefit options at UC (Pension Choice vs. Savings Choice)**
- **Evaluating your individual situation and priorities**
- **Rollovers into UC Retirement Savings Program**
- **Pre-retirement planning & CAP elections**
- **Comprehensive retirement income planning**

**Rand Erickson will be available on the following dates:**

**Location:**

**Date:**

**Time:**

**Room:**

### MEET YOUR FIDELITY CONSULTANT



**Rand Erickson** joined Fidelity as a Workplace Financial Consultant in 2015. A Chartered Retirement Planning Counselor<sup>SM</sup> and registered securities representative, Rand holds a bachelor's degree in economics from Brigham Young University.

**Schedule your one-on-one appointment.**



Call: **800.558.9182**



Register online:  
[Fidelity.com/schedule/UC](https://www.fidelity.com/schedule/UC)

**We're committed to helping you make informed, thoughtful decisions to meet your goals.**

### Investing involves risk, including risk of loss.

This information is intended to be educational and is not tailored to the investment needs of any specific investor.

Advice provided with respect to non-ERISA retirement plans will not be deemed fiduciary in nature under ERISA or the Internal Revenue Code.

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