

Tools and Resources for You on Your Journey to Financial Wellness



START YOUR JOUNRNEY WITH THE FINANCIAL WELLNESS **CHECKUP:**



Get help making the most of your money by visiting the *Financial Wellness Center* and taking the <u>financial wellness checkup</u>. Whether you're balancing the day-to-day, paying down debt, or trying to get (and stay) on target, we're here to help.

It's a great starting point toward progress. See how you're doing, plus find small steps to help you do even better.



CREATE AN



help prepare you for whatever comes your way. Things to Know about an

Emergency Fund Video (1:42).

UNDERSTAND YOUR DEBT: Prioritize high interest debt and then review what debt may

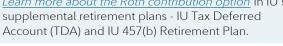


make sense to pay off and what debt is ok to keep. Learn more about managing debt with this on-demand workshop.

EXPLORE YOUR OTHER



ROTH CONTRIBUTIONS: Learn more about the Roth contribution option in IU's

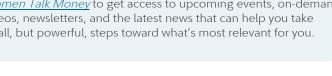




GET CUSTOMIZED HELP IN CREATING YOUR FINANCIAL PLAN

Peace of mind starts with having a financial plan. Visit Women Talk Money to get access to upcoming events, on-demand videos, newsletters, and the latest news that can help you take small, but powerful, steps toward what's most relevant for you.







Keep Your Accounts Clean



REVIEW OR UPDATE YOUR **BENEFICIARY DESIGNATIONS**



Using a simple, online process—Fidelity NetBenefits®. Why is it important to name a beneficiary? As a reminder, your beneficiaries are separate from your Life Insurance Program. It is important to update your information for all accounts and review your designations whenever you experience a life event (marriage, divorce, death, or birth).



CREATE A WILL, TRUST, OR ESTATE PLAN.



Learn more about how to get started during an on-demand workshop.







way to store, access and share digital copies of your most important documents.1

Here are a few points to consider.



We're Here to Help

<u>Lori Matthews and Ben Apraez</u> understand the IU retirement plans and are here to help you plan for your financial future. If you have never attended a group event, or met 1:1, you can get started today. Consultations and virtual events are available at no cost to all Indiana University employees and IU retirement plan participants.











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