



MEETING FINANCIAL WELLNESS CHALLENGES TOGETHER

▶ You Got This. Your Best Financial Life is Waiting.



A NEW FINANCIAL REALITY

Your financial wellness account upgrade.

The upgrade gives you access to a new account experience with financial wellness education and tools that can help you:

- Manage your day-to-day finances
- Achieve important financial goals by identifying areas you may want to focus on with the Financial Wellness Assessment
- Protect yourself against key financial risks

The screenshot shows the Prudential Financial Wellness account upgrade interface. At the top, there is a navigation bar with the Prudential logo, "MY ACCOUNTS", "MY FINANCIAL LIFE", and "MY SERVICE CENTER". A user is logged in as "Hi, John" with a "Log Out" option. Below the navigation bar, there are links for "Home", "My Interests", "Tools", and "Financial Wellness". The main content area features a large image of two children playing in the water at sunset. Overlaid on this image is a white box with the heading "What Is Financial Wellness?" and a sub-heading "It's the peace of mind you feel when you've balanced saving and spending ... living well today and planning for tomorrow. How do you achieve it? That's why you're here." Below this, there is a section titled "Let's pick up where we left off" with the text "Your personal financial assessment will help you figure out where to focus first. To finish is a great start!". At the bottom, there is a section titled "How stressed are you about your financial situation?" with three options: "Not at all stressed" (smiley face), "Somewhat stressed" (neutral face), and "Very stressed" (frowny face with X's). A "Next" button is located below these options.

THE FINANCIAL WELLNESS EXPERIENCE

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THE FINANCIAL WELLNESS EXPERIENCE

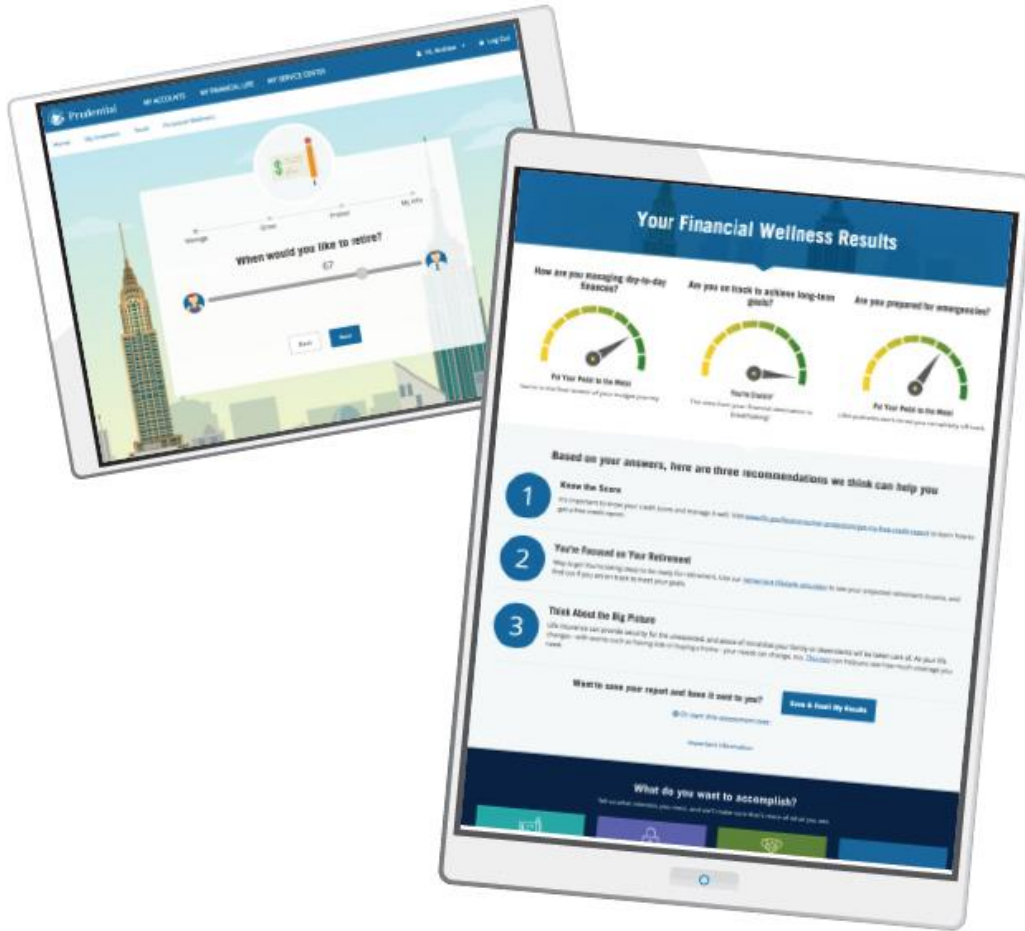
Here's what's included with your upgrade

The site hosts helpful content that includes a wide range of topics, including: budgeting, debt management, life insurance, estate planning, college funding, and saving for retirement. The content will be customized over time based on your interests and goals.

- ✓ The new “My Accounts” homepage provides a consolidated view of all your Prudential accounts.
- ✓ Manage personal finances and a budget on a single site
- ✓ The “My Financial Life” tab contains education and tools and is accessible anytime, from any device.
 - Interactive and insightful tools, including self-assessment and budgeting tools
 - Over 100 short and relatable educational articles
 - Engaging, topic-specific videos



THE FINANCIAL WELLNESS TOOLS



Financial Wellness Assessment tool

Answer a few simple questions to get personalized tips for:

- Managing day-to-day finances
- Achieving long-term savings goals
- Preparing for emergencies

Accessing the Financial Wellness Assessment Tool

Go to My Accounts  My Financial Life  Tools 

Tool: Financial Wellness Assessment



THE FINANCIAL WELLNESS TOOLS



Aggregating your accounts with the Budget Tool

- Manage your personal finances and budget in one place
- Track spending by category
- Get a consolidated view of bank and credit card accounts

Accessing the Plan a Budget tool

Go to My Accounts  My Financial Life  Tools 

Tool: Keep track of your money



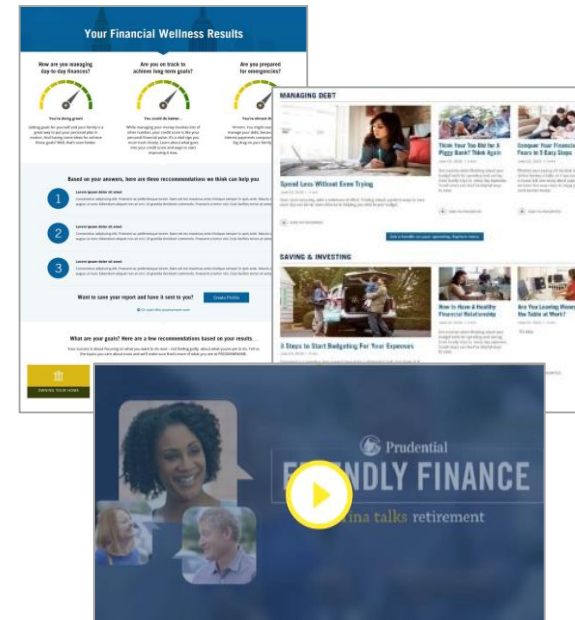
ON-SITE AND ON-DEMAND LEARNING

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ON-SITE LEARNING



DIGITAL LEARNING (INCLUDING WEBINARS)



**Engagement Services to help you take action to improve
your financial well being**

GET THE FINANCIAL WELLNESS EXPERIENCE

To take advantage of these new Financial Wellness tools, your account must be registered online.

- If you have not registered your account, visit **prudential.com/online/retirement**
 - Click on “Register Now.”
 - Follow the on-screen prompts to complete the registration process.
- Registering your account online makes it fast and easy to take control of your retirement planning. It is also an important step in helping to safeguard the security of your account.

Already registered? Watch how easy upgrading is. [Watch the tutorial video.](#)



THANK YOU

UPGRADE YOUR ACCOUNT

Your best financial
life is waiting.

[Log in to get started](#)

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AMAZON ALEXA

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Get started

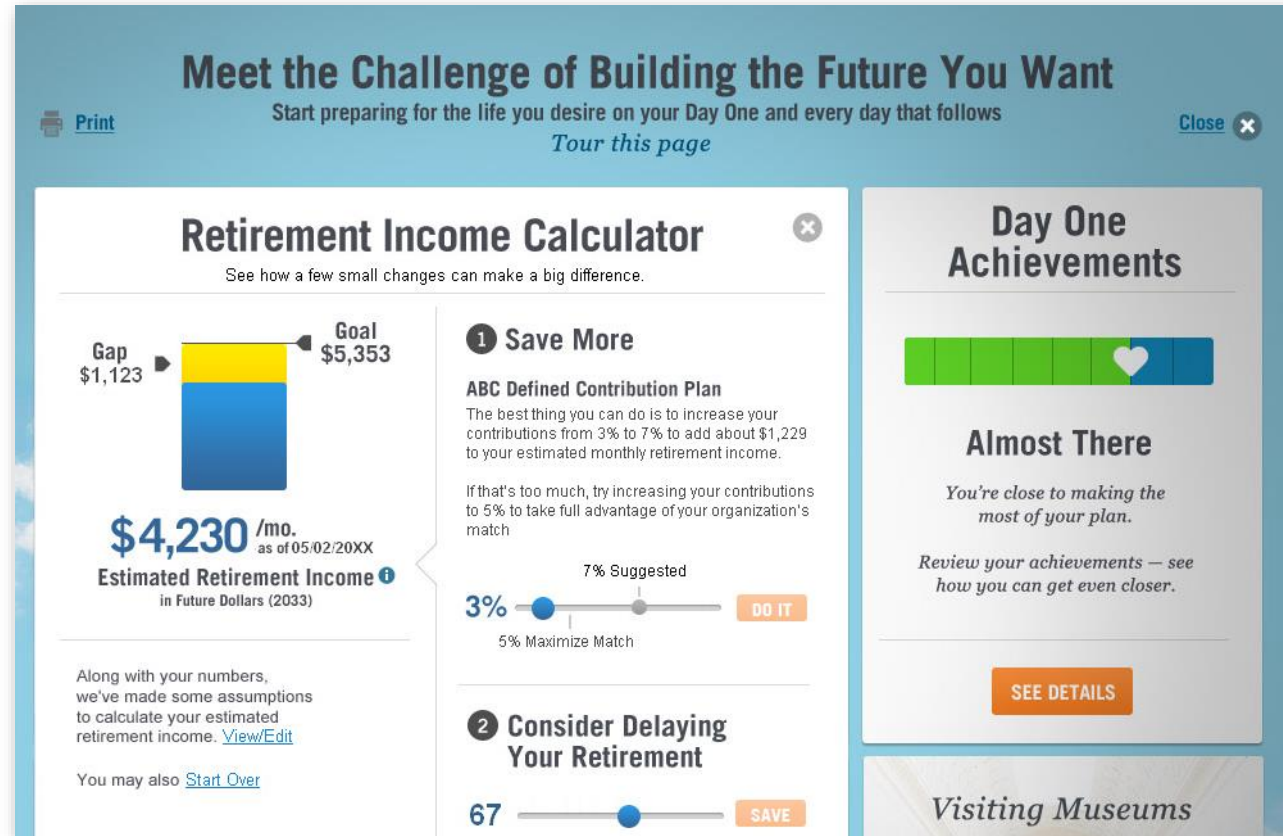
“Alexa, ask Prudential Retirement for my account balance.”

Where are you on the road to retirement? Get your Prudential Retirement® account balance today.

Get started



RETIREMENT INCOME CALCULATOR



Participants using the Retirement Income Calculator should consider other assets, income and investments (e.g. equity in a home, Social Security benefits, individual retirement plan investments, etc.) when assessing the adequacy of the estimated income stream as provided by this tool. The Retirement Income Calculator is hypothetical, for illustration only and not intended to represent performance of any specific investment, which may fluctuate. There is no assurance that retirement income objectives will be met. **You can lose money by investing in securities.**

ADDITIONAL ACCOUNT TOOLS

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- ◆ Retirement statement
- ◆ Toll-free number 877-778-2100
- ◆ prudential.com/online/retirement

The screenshot displays the Prudential Retirement website interface. On the left, there is a login section titled "Welcome to Prudential Retirement" with a "Log In" heading. It includes input fields for "User ID" and "Password", a "Forgot User ID or Password?" link, and a yellow "Log In" button. Below this is a "New User?" section with a "Register Now" button and a "Need Help?" link. At the bottom of the login section, there are links for "Information About Internet Security" and "Download Our Free Apps:", which includes links for the Retirement Mobile App (iPhone and Android) and the Retirement Income Calculator (iPhone and Android). On the right, there is a promotional banner for Alexa integration. It features the text: "Alexa, ask Prudential Retirement for my account balance." followed by "Where are you on the road to retirement? Get your Prudential Retirement® account balance today." and a blue "Learn More" button. An Amazon Echo device is shown on the right side of the banner. The Amazon Alexa logo is visible at the bottom of the banner, along with a small disclaimer: "Amazon, Alexa and all related logos are trademarks of Amazon.com, Inc. or its affiliates."

Optional:
If needed, please update with
Custom website and/or Custom
phone:

Delete text box if no custom website
or phone number.

QUESTIONS



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