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 Financial Wellness Experience

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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
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

ON-SITE LEARNING

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

DIGITAL LEARNING (INCLUDING WEBINARS)
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
“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
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.
ADDIONAL ACCOUNT TOOLS

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

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

Delete text box if no custom website or phone number.
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