CSU The California State University

Fidelity INVESTMENTS

One-on-one guidance from Fidelity.

We can help you plan for today—and tomorrow.

At Fidelity, we understand that you are busy managing multiple financial priorities, which can make planning for retirement a challenge. As your financial partner, Fidelity is committed to helping you plan for a future that's unique to you.

Meet with us one-on-one, and you'll be able to tap into the education, resources, and support that only a trusted partner can provide. Plus, consultations with a Fidelity Representative are free to you as an employee benefit.

Matthew Case, your dedicated Fidelity Retirement Planner, will be at your workplace in the near future to help you address many questions, including:

- Am I investing properly?
- Am I on track with my retirement savings?
- How do I bring my retirement savings together?

Your Dedicated Fidelity Retirement Planner

Matthew Case, a Fidelity retirement planner, has more than 11 years with the company. He was previously a financial consultant for Fidelity's Personal Investing Group. A CERTIFIED FINANCIAL PLANNER™ certificant, investment advisor representative, and registered securities representative, Matthew holds a bachelor's degree in economics from the University of Utah and a master's degree in finance from the University of Utah.

Click here to schedule an appointment

Matthew will be at your workplace as noted below. Appointments are required for one-on-one consultations.

Help Desks welcome drop-ins without an appointment.

Event: One on one consultations - Appointment needed

Date: Tuesday, August 8th

Time: 10am to 4pm

Location/Room: San Francisco State University - Administration Bldg. Room 255

Schedule your one-on-one appointment.

Call: **800.642.7131**

Register online: **getguidance.fidelity.com**

Fidelity has built its reputation on helping people create the someday they imagine. Now put our experience to work for you.

Investing involves risk, including risk of loss.

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