

Resources to help with your financial well-being



Save



Plan



Grow

Additional complimentary resources from Fidelity to help with your financial well-being.

Cleveland Clinic together with Fidelity, wants you to feel confident and in control of your financial situation. Check out additional resources, accessible through Fidelity Investments that can help you better manage your financial well-being.



NEW IN 2026: FIDELITY'S FINANCIAL WELLNESS COACHES

Pick your next financial wellness goal and let Fidelity's Financial Wellness Coaches help you with:

- Creating and maintaining a budget
- Building emergency savings
- Managing debt and improving credit
- Planning for goals, such as buying a home

[Click here to schedule your appointment.](#)



ONE-ON-ONE INVESTMENT ADVICE

Schedule a one-on-one consultation with your Fidelity representative, and get complimentary investment advice.

They can also help you with your Cleveland Clinic Retirement Program:

- Review your overall retirement savings portfolio
- Evaluate your investment choices and asset allocation
- Discuss strategies to help protect your assets and future income

[Click here to schedule an in-person, phone, or virtual complimentary consultation at Fidelity.com/schedule](#)



LOCAL FIDELITY INVESTOR CENTER

At no additional cost to you, we can help you build a customizable plan that includes more than just the Cleveland Clinic Retirement Program. Get help building a comprehensive financial plan.

Fidelity representatives at the Investor Center can help you with:

- Multi-goal planning
- Consolidation
- Estate planning strategies
- Tax efficient investing advice

[To find your nearest Fidelity Investor Center, go to Fidelity.com/branchlocator](#)



NEW IN 2026: EMERGENCY SAVINGS PLANS

Fidelity Goal BoosterSM

- Save for an unexpected expense and the worry that goes with it
- The potential to earn interest on your emergency savings
- Easy access to your savings

Fidelity makes it simple and easy to help you get started. Set it and forget it. Put money aside, even a small amount, at a frequency you choose.

[Click here to get your emergency savings plan with Goal BoosterSM.](#)

You can easily set recurring transfers from your bank or paycheck to grow your plan.



GENERAL ACCOUNT QUESTIONS AND INFORMATION

If you have general questions about your Cleveland Clinic Retirement Program balance or plan features, contact Fidelity at [888-388-2247](tel:888-388-2247) or visit [NetBenefits.com](https://www.netbenefits.com).

[Click here for online assistance. You can online chat with a representative or use the NetBenefits virtual assistant.](#)

Investing involves risk, including risk of loss.

Fidelity retail products and services are offered separately from your employer-sponsored retirement plan.

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