



Financial Wellness Symposium 2020 Resources

Thank you to everybody who participated in the 2020 Financial Wellness Symposium.
Here are some additional resources:

My Secure Advantage (MSA)

- [MSA's website](#) for Getty employees
- [Overview](#) of MSA's benefits
- **Dreaming of Retirement Session**
 - [Dreaming of Retirement: First Steps](#)
 - [Funding Retirement: Projected Lifestyle Costs Worksheet](#)
 - [Retirement Assets & Income Worksheet](#)
 - [How MSA Can Help with Retirement](#)
- **Making Tax Returns Less Taxing Session**
 - [Basic Tax Principles and Calculations](#)
 - [MSA's Assisted Tax Prep Service](#)
 - [MSA's "Do It Yourself" Tax Prep Services](#)
- **Estate Planning: Financial Basics Session**
 - [Estate Planning: First Steps](#)
 - [Preliminary Questions Worksheet](#)
 - [How MSA Can Help with Estate Planning](#)

Vanguard

- [Vanguard's "Ask an Advisor" Service](#)
 - Free for employees age 55+
- [Retirement Income Calculator](#)
- [Retirement Nest Egg Calculator](#)
- [Retirement Plan Loan Calculator](#)
- [Vanguard's Online lessons](#)

Getty Medical Plans

- [Chart for deciding between health care options](#)
 - PCP, Virtual Visit, Urgent Care or Emergency Room

Retiree Medical Plan / Retiree Medical Subsidy Plan

- [Retiree Medical Coverage & Working Past 65 presentation](#)
- [Retiree Medical Plan/Retiree Medical Subsidy Plan/RRA Summary Plan Description \(SPD\)](#)
- [UnitedHealthcare's website](#) for Getty employees
- [Mercer's Top Facts about Social Security & Medicare](#)