

FIDELITY WEALTH MANAGEMENT WEBINAR

Insights Live:
Withdrawal strategies in retirement

December 01, 2022



Our Speakers



Ally Donnelly
Director, Editorial and Content Lead, Fidelity Investments

Ally Donnelly is the editorial and content lead for digital content here at Fidelity. Her work focuses on innovative video and audio projects that connect and communicate with Fidelity's clients in relevant and accessible ways.



Jessica Maloy
Vice President, Wealth Planner, Fidelity Investments

As a wealth planner at Fidelity, Jessica has a profound commitment to the health and harmony of the families she supports, focusing on areas of their financial plans ranging from estate planning and philanthropy to tax management and asset allocation.



Tim Collins
Regional Vice President, FILI, Fidelity Investments

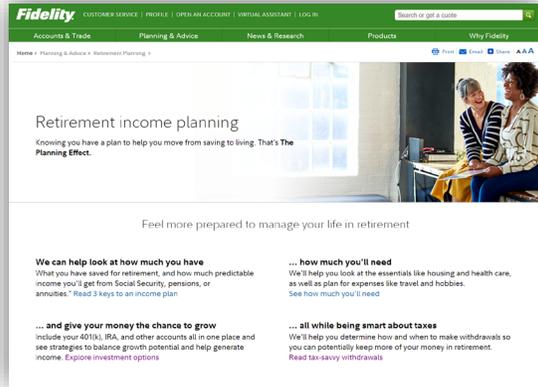
Tim Collins is a regional vice president at Fidelity Investments and is based in Sarasota, Florida. In this role, Tim assists Fidelity advisors throughout the Southeast with developing and implementing personalized financial and retirement income plans for Fidelity's clients.



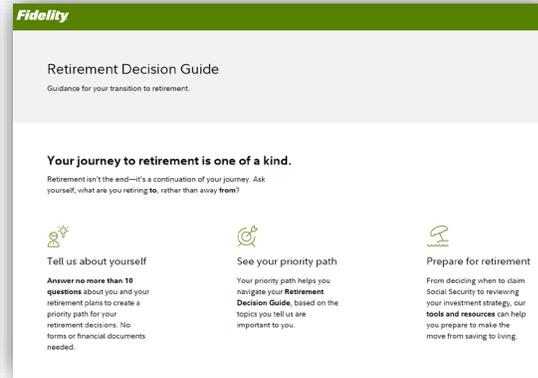
Jerry Patterson
President, FILI, Fidelity Investments

Jerry Patterson has been a presence in the financial services industry for more than 25 years and has held diverse and senior roles at some of the nation's largest financial institutions. Jerry currently serves as president of, Fidelity Investment Life Insurance Company, where he leads the company's insurance and retirement income businesses. Key focus areas include helping Americans transition from a life of working and saving to a life in retirement featuring income security, and ensuring that no family is surprised with financial hardship by failing to secure the insurance protection they need.

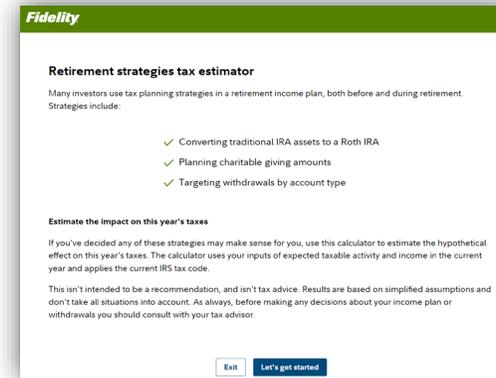
Additional Helpful Resources



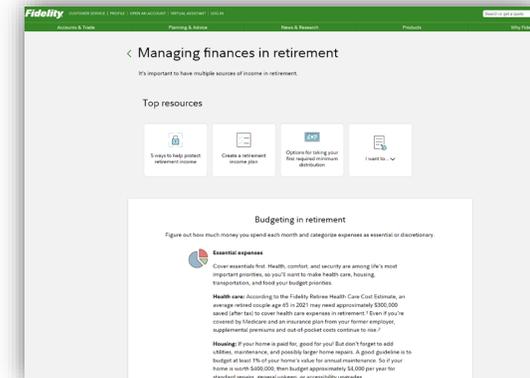
Retirement Income Planning



Retirement Decision Guide



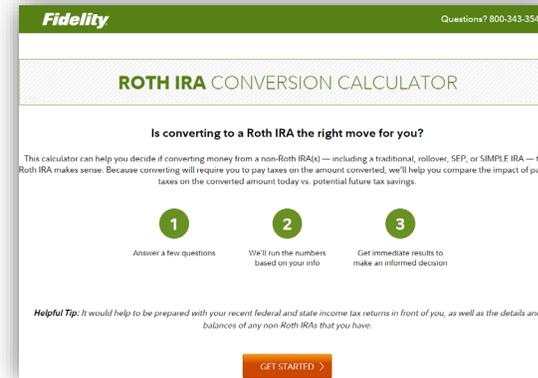
Retirement strategies tax estimator



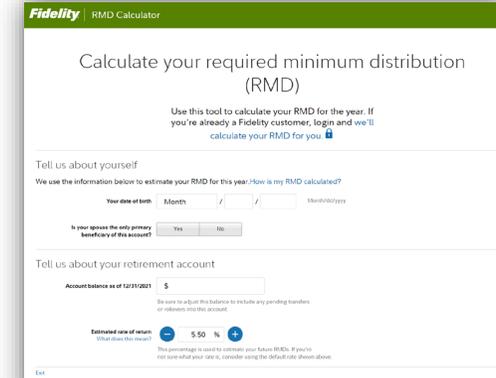
Managing finances in retirement



When should I apply for Social Security?



Roth IRA Conversion Calculator



RMD Calculator



How much will health care cost you in retirement

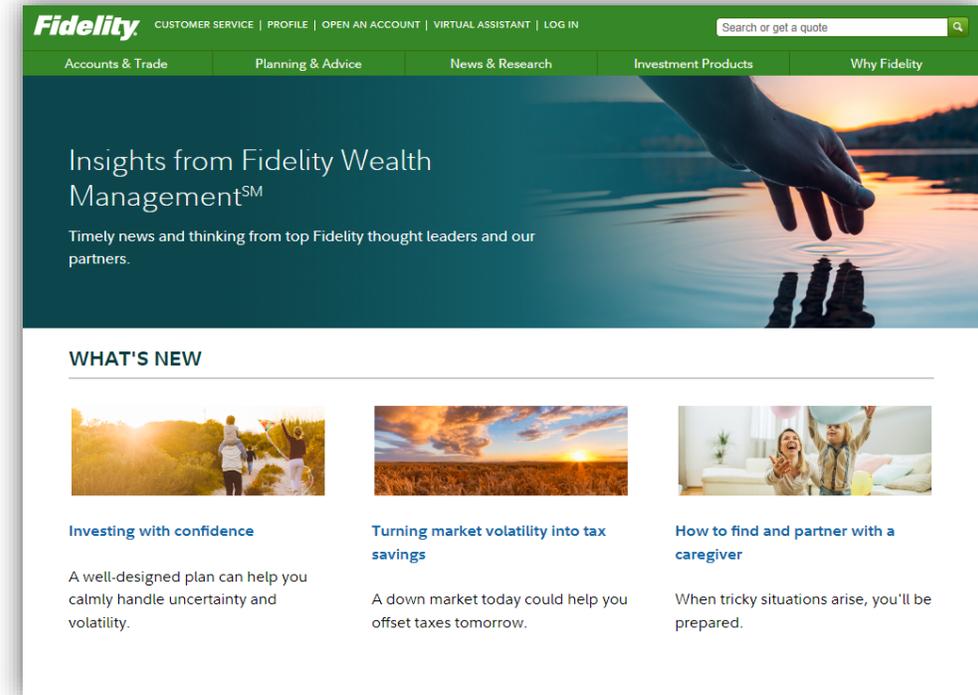
Next Steps to Take

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- ▶ Answers questions you and your family may have regarding your evolving needs and goals
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For illustrative purposes only.

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Statistical Claims:

1. 2022 Retiree Health Care Cost estimate based on a hypothetical opposite-gender couple retiring in 2022, 65-years-old, with life expectancies that align with Society of Actuaries' RP-2014 Healthy Annuitant rates projected with Mortality Improvements Scale MP-2020 as of 2022. Actual assets needed may be more or less depending on actual health status, area of residence, and longevity. Estimate is net of taxes. The Fidelity Retiree Health Care Cost Estimate assumes individuals do not have employer-provided retiree health care coverage, but do qualify for the federal government's insurance program, Original Medicare. The calculation takes into account cost-sharing provisions (such as deductibles and coinsurance) associated with Medicare Part A and Part B (inpatient and outpatient medical insurance). It also considers Medicare Part D (prescription drug coverage) premiums and out-of-pocket costs, as well as certain services excluded by Original Medicare. The estimate does not include other health-related expenses, such as over-the-counter medications, most dental services and long-term care.

2. 20% Health care cost claim, Source: Healthline.com as of 11/19/21.

3. \$200,000 more in health care costs than male counterparts claim, Source: HealthView Services, "Addressing the Women's Longevity Gap."

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