

# Financial Wellness Challenge - List of Suggested Activities



ACTIVITY	STEPS
1	Find important information and get the most from Fidelity's powerful tools and education. Download the NetBenefits Mobile App.
2	<p>Find important information and get the most from Fidelity's powerful tools and education. Download the NetBenefits Mobile App.</p> <p>Make sure your 401 (k) Savings Plan is being passed on the way you want. Over 45% of ZOLL participants do not have a beneficiary elected.</p>
3	<p>Make sure your 401 (k) Savings Plan is being passed on the way you want. Over 45% of ZOLL participants do not have a beneficiary elected.</p> <p>Understand how to save for your child's education with a 529 plan.</p>
4	<p>Understand how to save for your child's education with a 529 plan.</p> <p>Teach your teenager money skills for life.</p>
5	<p>Teach your teenager money skills for life.</p> <p>Check out Fidelity's Cyber and Fraud best practices for protecting yourself and the elders in your life.</p>
6	<p>Check out Fidelity's Cyber and Fraud best practices for protecting yourself and the elders in your life.</p> <p>Don't leave your retirement to chance. Review our Total Retirement Planner with a CAPTRUST Advisor at no charge to you.</p>
7	<p>Don't leave your retirement to chance. Review our Total Retirement Planner with a CAPTRUST Advisor at no charge to you.</p> <p>Attend the August 7 Financial Wellness Education Series presentation of Quarterly Market Perspective and get a unique look at what's been influencing the financial markets.</p>
8	<p>Attend the August 7 Financial Wellness Education Series presentation of Quarterly Market Perspective and get a unique look at what's been influencing the financial markets.</p> <p>Reviewing your beneficiary designations is a critical part of the overall planning process. Make sure your life insurance benefit is being passed on the way you want.</p>
9	<p>Reviewing your beneficiary designations is a critical part of the overall planning process. Make sure your life insurance benefit is being passed on the way you want.</p> <p>Check out the many Calculators available to you on the CAPTRUST website.</p>
10	<p>Check out the many Calculators available to you on the CAPTRUST website.</p> <p>Increase your knowledge of Advanced Trading utilizing Fidelity.com offerings.</p>
11	<p>Increase your knowledge of Advanced Trading utilizing Fidelity.com offerings.</p> <p>Create a free My Social Security account to estimate, plan and manage your benefits online.</p>
12	<p>Create a free My Social Security account to estimate, plan and manage your benefits online.</p> <p>Check out the Top 25 Documents List to view various financial documents that you may need in each stage of life.</p>
13	<p>Check out the Top 25 Documents List to view various financial documents that you may need in each stage of life.</p> <p>Take time to teach your teens about money.</p>
14	<p>Take time to teach your teens about money.</p> <p>Attend the August 14 Financial Wellness Education Series presentation of Navigating Market Volatility.</p>



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15	Learn about different types of insurance including disability, life, and long-term care in a quick 4 minute video from CAPTRUST.	<a href="https://www.captrustadvice.com/types-of-insurance/">https://www.captrustadvice.com/types-of-insurance/</a>
16	Approaching age 65? Learn about or refresh your knowledge of Medicare with our partner Doctor's Choice.	<a href="https://flow.doctorschoiceusa.com/group/zoll">https://flow.doctorschoiceusa.com/group/zoll</a> <a href="#">Doctors Choice Introduction</a>
17	Check your Credit Score. Checking your credit history and credit scores can help you better understand your current credit position.	
18	Head over to Fidelity's "How You Money" series of short but informative videos on a range of topics.	<a href="https://www.howyoumoneytips.com/gb">https://www.howyoumoneytips.com/gb</a>
19	Review your pay slip and understand each earning and deduction.	<a href="https://wd5.myworkday.com/wday/authgwy/zoll/login.html">https://wd5.myworkday.com/wday/authgwy/zoll/login.html</a>
20	How to save for future Medical Expenses - check out Fidelity's information on HSAs. Is it right for you?	<a href="https://nb.fidelity.com/public/nb/default/home?option=launchdeeplink&amp;Target=dowbt000000000003177">https://nb.fidelity.com/public/nb/default/home?option=launchdeeplink&amp;Target=dowbt000000000003177</a> <a href="https://nb.fidelity.com/public/nb/default/home?option=launchdeeplink&amp;Target=dowbt000000000003178">https://nb.fidelity.com/public/nb/default/home?option=launchdeeplink&amp;Target=dowbt000000000003178</a>
21	Review all of your subscriptions - digital and physical. Eliminate any that are no longer relevant.	
22	Attend the August 21 CAPTRUST webinar titled Retirement Income Withdrawal Strategies.	<a href="https://www.captrustadvice.com/upcoming-webinar-retirement-income-withdrawal-strategies/">https://www.captrustadvice.com/upcoming-webinar-retirement-income-withdrawal-strategies/</a>
23	Check out the budgeting worksheet to help you plan your monthly finances (Spanish version as well).	<a href="https://www.webmdhealth.com/content/s/773/Budgeting_Worksheets.pdf">https://www.webmdhealth.com/content/s/773/Budgeting_Worksheets.pdf</a>
24	Make a positive financial decision by cooking at home, making your own coffee, etc.	
25	Juggling paying off debts and saving can be stressful, especially if you are not sure where to start. Read the balance debt, saving and investing infographic to see a step-by-step guide that can help you decide what to tackle first.	<a href="https://www.webmdhealth.com/content/s/773/Balance_Infographic_Marketplace_Solutions.pdf">https://www.webmdhealth.com/content/s/773/Balance_Infographic_Marketplace_Solutions.pdf</a>
26	Collect your banking information. Gather a list of all bank accounts with online login information and a list of safe deposit boxes. Ensure your spouse, child or executor is registered.	
27	Make sure your 401 (k) Savings Plan is being passed on the way you want. Over 45% of ZOLL participants do not have a beneficiary elected.	Log into NetBenefits > Accounts & Benefits > Popular Tasks >About you > Update your beneficiary
28	Attend the August 28 Financial Wellness Education Series presentation of Estate Plans can help protect what matters most.	<a href="https://nb.fidelity.com/public/nb/default/home?option=ledetail&amp;Target=cours0000000000070608">https://nb.fidelity.com/public/nb/default/home?option=ledetail&amp;Target=cours0000000000070608</a>

