



## **Review details about Prisma Health retirement plans moving to Prudential**

As we continue to create a comprehensive total rewards package for Prisma Health team members, Prudential Retirement® (Prudential) has been selected to serve as the record-keeper for our retirement plans, effective Friday, Dec. 27, 2019. We want you to have plenty of advance notice about this change from our current provider for Midlands team members, Fidelity.

### **What this means for you**

No action is required on your part. We are working closely with Prudential to implement this change. The transition of Palmetto Health retirement plans with Fidelity to Prisma Health retirement plans with Prudential will happen automatically.

### **Next steps**

- You will receive additional information about this transition over the next two months. Details will be sent electronically and by mail to your home address.
- Details will also be discussed during a series of meetings the Human Resources team has planned for team members throughout October.
- In December and January, Prudential retirement counselors will be onsite to discuss the new resources available to you and answer your questions. Look for a schedule in the months ahead.

### **Features that will be available to you**

- On-site retirement team counselors will be available on a regular basis to meet with you, answer questions, explain plan features and help you build a personal retirement strategy.
- GoalMaker®, a free, optional asset allocation program that makes choosing an investment mix easier.
- Helpful online financial tools including a retirement income calculator, financial wellness self-assessment, budget planner, debt manager and more.
- 24/7 account access from your computer or mobile device.

Again, more information will be communicated over the next two months and you will have the opportunity to meet with retirement counselors beginning in December. In the meantime, please reach out to [Benefits@PrismaHealth.org](mailto:Benefits@PrismaHealth.org) with any questions.