

GATES® GoodLife

GOODLIFE WELLBEING MONTHLY – JULY 2021 (FINANCIAL WELLBEING)

[Live Well Monthly Newsletter](#)

Gates Benefits Highlights

Magellan EAP Newsletter: [Magellan July Newsletter](#)

PNC Bank: [Banking Perks for US Gates Employees](#); Monthly Workshop Meeting Invite – [Financial Fitness: Developing Healthy Spending & Credit Habits](#)

Schwab Services Highlights: July is our Financial Wellness Month, which means that now may be a good time to take charge of your finances. Spend a few minutes reviewing some of the resources in the Gates Matchmaker 401(k) Plan (the "Plan") that are available to help you work toward your goals.

Schwab Essentials Program.

Guidance, discounts, and cash award opportunities for US Gates employees.

We have some pretty exciting news to share with you! Because of our relationship with Charles Schwab, you can now take advantage of the Schwab Essentials Program. This exclusive opportunity gives you access to special perks that can help you get a few steps closer to your financial goals, including:

- Complimentary guidance from experienced Financial Consultants
- A cash award offer
- Discounts on managed investing fees
- Discounts on lending solutions through Schwab Bank

More information will be communicated by Gates and Schwab over the next couple months directly to you, so be on the lookout. Click here for a sneak peak of the program.

My Retirement Progress.™

Learn more about how it works.

My Retirement Progress is an interactive tool designed to help you answer a key question about your retirement plan: Will I have enough saved in retirement? The My Retirement Progress tool may help you better understand your retirement income goals and explore how small changes may affect how much you might need and if you will have enough saved in retirement. [Learn more about some key features of this interactive tool.](#)

The 2021 Webcast Series.

Get insights delivered your way.

Schwab Retirement Plan Services knows that getting the financial insights you need is more critical than ever. That's why they're delivering their 2021 Webcast Series across a wider range of topics and formats. Choose from a broad collection of on-demand content, monthly interactive webcasts, coffee talks, and live panel discussions. [Check out the 2021 Webcast Series highlights and register for events that interest you.](#)

Get personalized advice.

Schedule an appointment to chat one-on-one with an Advice Consultant.

The Plan offers you access to third-party personalized advice. This benefit can play a key role in your retirement savings. This advice calculates a target retirement income goal; provides personalized recommendations on how much to save for retirement, when you can plan to retire, and when to start taking Social Security benefits; and selects the investments for your account based on the investments available within your Plan. Information such as salary, account balance, savings rate, estimated Social Security benefits, and other sources of income creates a more holistic view of you, your retirement income goals, and your investment style. What's more, for a fee, you can receive professional management of your Plan account through the managed account service, which provides ongoing account monitoring and automatic adjustments to your investments as your retirement needs change and you get closer to retirement. The advice service is provided by Morningstar Investment Management LLC, an independent registered investment adviser. [Learn more about the advice service and how to reserve your time slot for a one-on-one meeting with an Advice Consultant.](#)

Questions?

Staying informed and connected is one of the keys to preparing for retirement. Here's how to access resources, connect, and get answers to your questions about planning for retirement:

- Call 800-401-5866, Monday through Friday, 6 a.m. to 10 p.m. CT.
- Log in to gatesretirement.com.
- [Download the Schwab Workplace Retirement App](#) to get on-the-go access to your Plan account.

Friendly Health Reminders & Resources

UV Safety Month – [Event Page](#)

National Grilling Month – [Food Safety Tips](#)