

Contact Information



We focus on retirement readiness, and we tailor our strategy to meet your needs. Our money coaches sit down with you one-on-one to get the full picture of your situation and goals, so we can guide you through every stage of life's journey. Our goal is to alleviate the pressure and intimidation of money management by making the process easy.

 **Group Education**

 **Online Library**

 **Individual Education Sessions**


 **Enrollment Videos**

Our Commitment to You

We are dedicated to helping you pursue your investment goals by providing personal attention and quality services.

How We Help You

- Understand your goals
- Gather information about your situation
- Evaluate your situation
- Discuss options
- Discuss updates and observations


 Retirement Support: 833-224-5660
Medicare Support: 833-684-0433

 info@oswaldfinancial.com



Fidelity helps you understand the importance of saving and investing and provide you with the support you need to feel empowered about the decisions you make. **Services Include:**

- Help with how to and how much to save for retirement
- Determining the right investment mix and how to create an investment strategy
- Educate and assist about loans and withdrawals
- Keeping track of individual assets in the Plan
- Assist with fund allocation and deferral changes
- Help where and when you need it: Phone, web, mobile or face to face
- Teaming up with Oswald to produce enrollment and education materials

 800-835-5095

 www.netbenefits.com