

# "ASK FIDELITY" WEBINARS

## SEPTEMBER 2025

### Get Answers to Your Most Important Questions

Whether you are a new employee, at mid-stage of your career, or actively planning for retirement, Fidelity can help you plan to make your dream a reality. Bring us your questions and your concerns, we will work together to create the right plan for you!

SEP  
18

#### How to Make the Most of Your Retirement Savings

12:00 - 1:00 PM

How much savings is enough for retirement? Learn strategies that can help you save more today, and get tips for preserving and growing your savings in retirement.

SEP  
24

#### What is a Roth In-Plan Conversion?

12:00-1:00 PM

Your retirement plan offers many ways to save for the future. Learn more about your options, including how to convert pre-tax dollars to a Roth using an in-plan conversion.

Register for Webinar



Victor Portillo

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Workplace Financial  
Consultant  
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### County employees have access to a dedicated Fidelity Workplace Financial Consultant for their retirement planning needs.

As your onsite resource, Victor will maintain office hours at the Government Center Hall of Administration and also visit other County locations to address any questions you may have about your retirement planning needs. Whether you're just starting out or nearing retirement, Victor is ready to address many questions, including:

- Am I investing properly?
- Am I on track with my retirement savings?
- How do I bring my retirement savings together?
- How do I turn retirement savings into ongoing, steady income?

Victor provides a variety of resources, including:

- **Workshops:** Live workshops are interactive and offer topics such as debt management and retirement income planning
- **Complimentary One-on-One Consultations:** Meet with Victor in-person or virtually to address your financial questions. These consultations are complimentary as a County of Ventura employee benefit. Appointments are required, so please schedule a time that's convenient for you online at [www.fidelity.com/schedule](http://www.fidelity.com/schedule) or by calling 800.642.7131\*\*

\*\*Be sure to mention you have a dedicated Workplace Financial Consultant