



your wealth

financial planning providers

human energy. yours.™

Financial planning firms may contact employees to offer financial advice or services. Many of these companies advertise seminars and claim to work with Chevron employees or have knowledge about our retirement plans. Chevron has relationships with only a few financial planning firms and we do not endorse any others.

financial planning firms that have relationships with chevron

You may work with anyone you choose for your financial planning needs. Chevron has relationships with the following financial planning firms:

- Fidelity
- The Palo Alto Group at Morgan Stanley
- Ayco
- The Mason Companies

Fidelity is the record keeper for the Employee Savings Investment Plan (ESIP) and provides onsite retirement workshops. If you are eligible to attend one of these workshops, an email invitation will be sent to you from **Your Chevron U.S. Benefits**. Fidelity also has planning and advice resources for all ESIP participants, including investor centers across the U.S., one-on-one phone support and a variety of online tools.

The Palo Alto Group at Morgan Stanley, Ayco and The Mason Companies provide services as part of the Financial Counseling Program for U.S.-payroll employees in PSG 26 and above, and the Law Guide Curve.

what to do if you are contacted by a financial planning firm

If you receive unsolicited emails, phone calls or social media advertisements from financial planning firms other than those listed above, it is your choice to meet with them to discuss your personal finances or attend their seminars. However, you should be aware that they are not associated with Chevron and we have not provided them with any information about you or our plans.



more information about retirement planning

Visit the retirement resources on the [U.S. HR website](#) for information about our retirement and savings plans and resources to help you plan for your financial future.