



Financial Planning Providers

Your Wealth.



We have received reports about financial planning firms contacting employees to solicit financial advice. Many of these companies advertise seminars and claim to work with Chevron employees or have knowledge about our retirement plans. Chevron only has relationships with a few financial planning firms and we do not endorse any others.

Financial Planning Firms That Have Relationships with Chevron

Chevron has relationships with the following financial planning firms; however, you may work with anyone you choose for your financial planning needs:

- Vanguard
- Morgan Stanley
- Ayco
- The Mason Companies

Vanguard administers 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*.

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. Chevron pays the costs associated with this program, but the counseling is strictly between you and the provider. Chevron is not responsible for any advice provided.

What to Do if You Are Contacted by a Financial Planning Firm

If you receive unsolicited emails or phone calls 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.

Where to Find 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. Choose the [Retirement](#) link in the Employee Benefits section.