



financial guidance

for U.S.-payroll employees

Due to increased demand for financial support during this time, we are pleased to offer **two** options for receiving complimentary one-on-one financial guidance:

Fidelity

Fidelity administers Chevron's 401(k) plan – the Employee Savings Investment Plan (ESIP) – and offers one-on-one consultations year-round to help you develop a comprehensive retirement and investment plan that aligns with your goals.

[Learn more](#) about Fidelity's guidance and advice resources.



[Schedule an appointment with Fidelity](#)

Morgan Stanley

Morgan Stanley provides executive financial counseling and administrative services for the Chevron Long-Term Incentive Plan (LTIP). They are offering one-on-one consultations for *all* employees to answer financial questions and help with building a personalized strategy. Note: You do *not* have to be a participant in the LTIP to schedule a consultation with Morgan Stanley.



[Request a consultation with Morgan Stanley](#)

Common discussion topics for these sessions include:

- Planning for the unexpected
- Short- and long-term financial considerations
- Impact when considering expression of interest
- Retirement planning 101
- Strategies for LTIP, performance shares, restricted stock units, and stock options (*Morgan Stanley only*)

Please keep in mind...

Chevron has relationships with a few financial planning firms, including Fidelity, Morgan Stanley, Goldman Sachs Ayco and The Mason Companies. If you receive unsolicited contact from other financial planning firms, it is your choice to meet with them. However, they are not associated with Chevron, and we have not provided them with any information about you or our plans.