



Include Estimated Pension Income in the Retirement Analysis Tool

Follow these steps to add your pension income to the Retirement Analysis tool accessed through Planning Summary:

1. Gather the pension estimates you performed during your retirement planning.
2. Navigate to [Financial Wellness Dashboard](#) on NetBenefits.
3. Create or review your Retirement Goal.
4. Complete the Retirement Income Section; This will break out your income sources for Social Security, Pensions and Annuities.
 - a. Enter manually any pension income earned at prior employer (if applicable). Call your prior employer to request the pension estimate and enter the results.
 - b. For Fidelity-recordkept pensions, you will be able to leverage the Pension Modeler tool within the pension category of the Retirement Income section. Changes to modeled projections are for scenario planning only and do not make any formal changes to pension elections.

For more information, review the "[Use the Retirement Analysis Tool](#)" in the Total Retirement Income section. If you have questions or want help reviewing your results, call a Workplace Planning consultant at 800-420-2363.