

Explore Financial Tools and Advice from FedEx + Vanguard



Retirement Projection and Modeling Tools

Use these retirement income tools from FedEx and Vanguard to determine how much monthly income your retirement savings may provide.

Retirement Readiness

401(k)-based retirement projection and modeling tool that forecasts savings sufficiency and retirement adequacy. Add your other assets to get your full retirement picture. Go to vanguard.com/retirementplans.

Vanguard Advice Tool

When you need more personalized advice based on your current stage in your retirement journey, you can use the Vanguard Advice Tool.

FedEx Retirement Savings Plan (RSP) participants have three options for financial advice services.

	Basic Financial Wellness (e.g., saving & budgeting)	401(k) Investment Advice	Ongoing Professional 401(k) Account Management	Retirement Projections and Modeling	Who should use this option?	Is there a fee for this service?
Vanguard Digital Advisor® A fully digital, comprehensive advice service that offers you a personalized financial plan and the peace of mind that comes with having ongoing money management tailored to all your personal needs and goals – not just retirement. Go to vanguard.com/retirementplans .	✗	✓ (Web-based only)	✗	✓	Best for: Team members who want traditional investment management, as well as holistic financial planning, but prefer an all-digital platform.	YES You only pay about \$15 annually for every \$10,000 you invest. No fees for the first 90 days.
Vanguard Personal Advisor® If you want the benefits of Digital Advisor combined with a personal touch, Personal Advisor might be for you. You'll get ongoing access to our advisors, who will manage your money and help you tackle your most complex financial issues. Go to vanguard.com/retirementplans or call 1.800.310.9228.	✗	✓	✓	✓	Best for: Team members with complex financial needs and those approaching retirement who want ongoing advice and management with a Vanguard advisor.	YES You only pay about \$30 annually for every \$10,000 you invest.
Vanguard Situational Advisor™ If you want to speak with an advisor about a financial situation that pops up, Situational Advisor has you covered. You can get help with any financial topic, from buying a house to saving for college, and more. Your advisor will give you recommendations that you can put into action. Go to vanguard.com/retirementplans to schedule an appointment online.	✓	✓	✗	✓	Best for: Team members seeking an assessment of their financial goals and investments or looking to navigate a life event such as a promotion or retirement.	YES You pay a one-time flat fee of \$250 per engagement.

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