

Severance from Chevron Checklist

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Insight
WEALTH STRATEGIES, LLC®

- Check NetBenefits for the value of your CRP & RRP
- Consider whether or not you would like to consult
- Max out your ESIP contributions prior to termination date (Pre-Tax, Roth, After-Tax)
- Contact HR and request a calculation of benefits (if you will be starting your CRP pension immediately)

Ask a Financial Advisor:

- Which elections should you make on RRP and CRP payouts (Lump sum or annuity)?
- Are you able to retire now? Or will you keep working?
- When should you start your pension, taking into account recent segment rate trends?
- Do you have NUA opportunities?
- What benefits will you need after Chevron? (Life insurance, disability, long-term/short-term care etc.)
- What do you need to do to avoid overpaying taxes when receiving payouts
- How much cash should you keep and how much should you invest?
- What is the plan to diversify CVX in your portfolio?