

# Benefits Playbook *Plays for Peak Performance*

An important component of your overall wellbeing is your financial health. The Nutanix benefits playbook offers lots of plays to improve your money game.



## Be a Smart Saver: Get More From Fidelity

- **Advisor services:** As your needs in life change, so does the help you require. Fidelity can help you plan for all life stages, from investment strategies to complex wealth management needs, to managing your portfolio. **Reach out** to Fidelity to schedule a 1 on 1 appointment with a dedicated Fidelity advisor.
- **Goal Booster:** When it comes to conquering your short-term savings goals, be sure to use Fidelity's **Goal Booster**. This tool helps you save for financial goals outside of retirement, including planning for emergency savings, owning a home, or going on a vacation.
- **Build wealth using a Roth account:** You can set aside more for retirement using the Roth after-tax feature in the Nutanix 401(k) Plan. A **Roth in-plan conversion** allows you to save an additional \$15,000 each year toward your retirement fund.

### Join the Fidelity Webinar on February 15

**Topic:** After-Tax 101

**Date:** February 15, 2023 (11 am PST)

**Location:** [Click here](#)

**Zoom ID:** 817 6270 1937 Dial In US: +1 669 900 6833

Includes general education about after-tax contributions from a financial wellness specialist, including:

- Contribution limits
- Power of compounding
- Contribution types and the tax treatment thereof
- Who should consider after-tax, and
- The importance of in-plan Roth conversions



## Stretch Your Dollars With the Health Savings Account (HSA)

Everyone enrolled in the UnitedHealthcare High Deductible Health Plan gets an HSA. The HSA is funded with **pre-tax payroll contributions**. As your account grows over time, earnings are also not taxed. Plus, when you use funds for qualified medical expenses, withdrawals are tax free.

**THE MORE YOU CONTRIBUTE, THE MORE YOU SAVE!** Each contribution potentially reduces your annual tax bill.

- **Are you maximizing your HSA savings this year?** You can contribute up to \$3,100 if you are enrolled for employee-only coverage, or up to \$6,250 for family coverage. For those age 55 or older, these amounts increase by an additional \$1,000.
- **Ready to save more?** [Follow these steps](#) in Workday.

### Join the Health Savings Account (HSA) Webinar on February 28

**Topic:** Nutanix, Inc—Future in focus: Investing your HSA for retirement savings

**Date:** February 28, 2023 (1 pm PST)

**Location:** [Click here](#)