<u>Severance from</u> <u>Chevron Checklist</u>

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Check NetBenefits	for the value	a of your CRI	D & RRP
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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?

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