



YOUR FINANCIAL WELLNESS PARTNER

As a San Mateo County employee with access to benefits, you already have access to Remotiv, your financial wellness platform.

Remotiv provides your annual Retirement Readiness Report and a digital financial wellness experience to help you work toward your savings goals and

Looking for Financial Wellness Incentive activities? Ask us how to get started!



SAVING FOR TODAY

The Saving for Today dashboard in the Remotiv Portal helps you uncover and tackle financial obstacles. It is open to every employee with access to benefits.

Whether you're paying off debt or saving for a wedding, this personalized financial wellness experience is designed to help you achieve your financial goals.

Saving for Today is available to you whether or not you have opted in to Saving for Tomorrow, the Retirement Readiness experience.

START YOUR FINANCIAL WELLNESS JOURNEY

To access your Portal, log in to your Okta account and find Remotiv. From there, you can switch between two dashboard options depending on your area of focus:

 **Saving for Today: Eliminating Barriers**

 **Saving for Tomorrow: Retirement Readiness**

RETIREMENT READINESS REPORTS ARE PAPERLESS



If you opted in to Saving for Tomorrow, you can download your 2026 Retirement Readiness Report from your Remotiv Portal the week of the benefit fair.

Prior Reports remain available for download from the Portal by clicking the profile icon, then Documents.



ONE TRAILHEAD. EVERY COUNTY FINANCIAL BENEFIT.

Remotiv is your financial well-being platform, and it connects you to the other financial resources San Mateo County already offers.

Think of the Remotiv Portal as base camp. Your Saving for Today dashboard starts with a personal financial assessment, then points you to County programs that may fit the obstacle you're working on. The Stories feed on your dashboard surfaces those programs, with the contact information you need to take the next step.

Looking for Financial Wellness Incentive activities? Ask us how to get started!



Empower

Your deferred compensation plan. Enroll in Workday. Questions to Empower at 833-SMD-PLAN (763-7526).



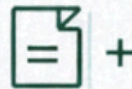
BALANCE

Free, confidential 1:1 financial coaching and counseling.
888-456-2227 or
balancepro.org.



Monterra Credit Union

Member benefits for County employees, from checking bonuses to auto loan discounts.
monterra.org/county.



Flexible Spending Accounts

Two County FSAs to pay yourself back for dependent care and healthcare expenses.

ScholarShare 529 Savings Plan

ScholarShare 529

California's college savings plan.
scholarshare529.com.

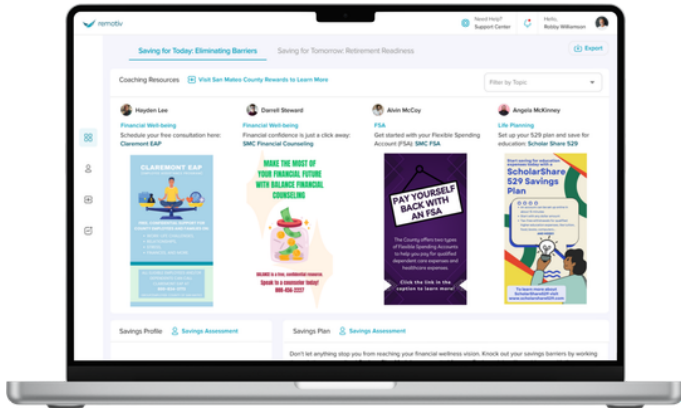


Employee Down Payment Assistance Program

County home purchase assistance. Contact Nila Kim,
nhkim@smchousing.org, (650)
802-5002.

Securities and advisory services offered through PlanMember Securities Corporation (PSEC), member FINRA/SIPC. Remotiv is a division of PlanMember. Projections are estimates, not guarantees.



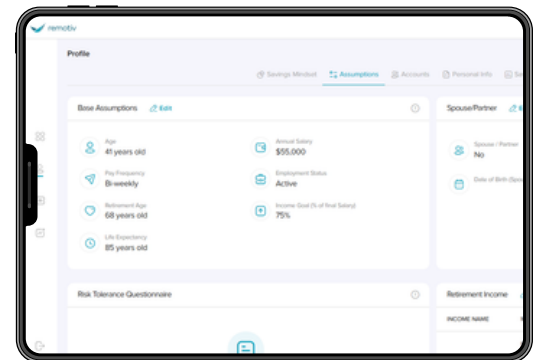


YOUR FINANCIAL WELLNESS AND RETIREMENT READINESS EXPERIENCE

One login through Okta. No registration needed.

YOUR RETIREMENT PICTURE

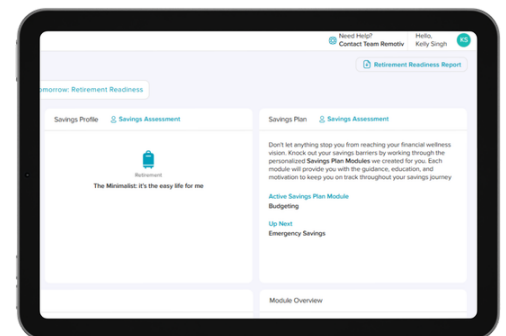
Your online Portal is pre-populated with your information, including a SamCera pension estimate, so it is easy to get started. To access your Portal, log in to your Okta account and locate the Remotiv tile.



DOWNLOADING YOUR REPORT

If you opted in to Saving for Tomorrow, you can log in to your Portal to download your 2026 Retirement Readiness Report the week of the employee benefit fair.

Prior-year reports remain available in your Portal at any time.



Retirement Readiness Reports are paperless.

SAVING FOR TODAY

Open to every employee with access to benefits. Start tackling your financial obstacles using the tools and resources in the Saving for Today dashboard. Begin by taking the financial assessment and completing your personalized action plan. Check out the Stories section for County financial benefits and services available to you.

Looking for Financial Wellness Incentive activities? Ask us how to get started!



UNDERSTANDING YOUR RETIREMENT READINESS REPORT



Sample report for a hypothetical participant. Projections are estimates and are not guarantees of future results.

1 Compare Strategies

Compare your current retirement savings strategy with the suggested strategy and review your key takeaway for a personalized retirement savings suggestion.

2 Retirement Profile

Make sure your information is accurate and includes all retirement related assets you may have.

3 RR Score

A rating that shows how likely you are to reach your retirement income goal. A score of 7.5 or better indicates you are projected to be on track to reach your goal.

4 Retirement Income Goal

Review and update your retirement income goal, which measures how much income you will need to cover your expenses in retirement.

5 Your Personalized Action Steps

Personalized savings plan and investment strategy suggestion.

6 Retirement Income

A breakdown of retirement income from all known income sources including an estimate of your SamCera pension (if applicable).

Securities and advisory services offered through PlanMember Securities Corporation (PSEC), member FINRA/SIPC. Remotiv is a division of PlanMember. Projections are estimates, not guarantees.

