

Shell Severance Checklist

To-do:

- Max out your Provident Fund Contributions before your termination date
 - Pre-Tax
 - Roth
 - After-Tax
- Max out your GESPP
- Log in to NetBenefits and check the value of your pension & BRPs
- Think about if you would like to consult

Contact HR to:

- Request a calculation of benefits**
(If you're considering starting your pension right away)
- Negotiate the ability to keep your restricted stock

Ask a Financial Advisor About:

- Which elections should you make on your BRP payouts?
- Can you retire now?** Your advisor will map out cash flow vs. expenses
- Where should you pull from first?** Let them know what benefits and accounts you have
- Determine what additional benefits you'll need after leaving Shell.** Ex. Life insurance, long-term care, dependent care, short-term disability, long-term disability, accidental death & dismemberment, and occupational accidental death
- Understand your options for healthcare after Shell.**
Ex. Retiree medical, Medicare, Cobra, or buying your own insurance plan
- What should you do with your cash?**
How much should you keep vs invest?
- Discuss a plan to avoid overpaying taxes when receiving the payout**
- Set up a plan to diversify Shell Performance Shares as they vest