



Including Estimated Pension Income in the Retirement Analysis Tool

Follow these steps to add your pension income to the Retirement Analysis tool accessed through Planning Summary:

1. Gather the pension estimates you performed during your retirement planning.
2. Navigate to **Planning Summary** on NetBenefits.
3. Create or review your Retirement Goal.
4. Complete the “Salary & Other Income” screens.

The Retirement Analysis tool will accept pension income earned at a prior employer. Request pension estimates from your prior employer and enter them into the tool as described above.

Review the “Using the Retirement Analysis Tool” in the Total Retirement Income section for more information or call a Workplace Planning consultant at 800-420-2363 if you have questions or want help reviewing your results.