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PPA eligible

Jane Sample
Theta Retirement Savings Plan

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Your investment mix may be too aggressive

Finding the right mix of investments (stocks, bonds, and cash) can be tricky, but it's key to helping you manage risk while potentially growing your money over time. While your current mix is designed to help maximize gains, it may also mean that you're taking on too much risk.

If you're looking for a more balanced approach, your plan offers resources to help—from do-it-yourself tools to professional management.

Do it yourself: Review and adjust your current allocation using the investment options in your plan lineup.

Review investments

Open a managed account: Fidelity's team of professionals will create an investment strategy based on your unique situation and provide ongoing monitoring and management.

Learn more

Use a target date fund: Choose a single diversified fund that's designed to become more conservative over time based on your expected retirement date.

Explore funds

Ready to take a closer look at your investment strategy?
Call us at **866-811-6041** or schedule a complimentary investment review.

Want to learn more first? Watch a short video to see how an aggressive mix could impact your retirement savings.

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Diversification and asset allocation do not ensure a profit or guarantee against loss.

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In assessing your investment mix, this report considers only the percentage of stock holdings within the named workplace savings plan account and does not consider other investment types. The report does not take into consideration stock or other investments you may hold in other workplace savings plan accounts or in other accounts you may hold with Fidelity or elsewhere. It also does not consider other factors, such as risk tolerance, that may affect your retirement mix decision. If you have gone through an online planning experience and received a recommended target asset mix, this assessment may not apply to you. If your planned retirement age is outside the range of 55 to 75, that is +/- 10 years from age 65, this assessment also may not apply to you.

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Target date funds are an asset mix of stocks, bonds, and other investments that automatically becomes more conservative as the fund approaches its target retirement date and beyond. Principal invested is not guaranteed.

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