100% invested in a single target date fund and auto enrolled

Jane Sample
Fidelity Retirement Savings Plan

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Does your investing strategy align with your goals?

How you balance and manage your investment mix (stocks, bonds, and cash) can have a big impact on your retirement savings over time. While there are many factors to consider, answering these questions can help in determining an investing strategy that works for you:

- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You were 100% invested in a target date fund when you were auto enrolled into your plan. These funds offer a simple way to invest for retirement and automatically adjust the investment mix over time as the fund approaches its target date. Periodically, it's a good idea to review your investing strategy to ensure that it still aligns with your financial goals, risk tolerance, and target retirement date—and your plan offers resources that can help.

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Want to learn more? Join a workshop for help creating an investing strategy that meets your needs.

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Investing involves risk, including risk of loss.

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

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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1215557.3.0

100% invested in a single target date fund

Jane Sample
Fidelity Retirement Savings Plan

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Does your investing strategy align with your goals?

How you balance and manage your investment mix (stocks, bonds, and cash) can have a big impact on your retirement savings over time. While there are many factors to consider, answering these questions can help in determining an investing strategy that works for you:

- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're 100% invested in a target date fund. These funds offer a simple way to invest for retirement and automatically adjust the investment mix over time as the fund approaches its target date. Periodically, it's a good idea to review your investing strategy to ensure that it still aligns with your financial goals, risk tolerance, and target retirement date—and your plan offers resources that can help.

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100% invested in a single target date fund with a target retirement year that is more than 10 years off (+/-) from what we would expect to see someone invested in, based on an assumed retirement age of 65

Fidelity INVESTMENTS

Jane Sample
Fidelity Retirement Savings Plan

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Does your investing strategy align with your goals?

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- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're 100% invested in a target date fund which is designed to the specific retirement year. This fund is a mix of stocks, bonds, and other investments that automatically become more conservative as the fund approaches its target date and beyond. Now is a good time to check the fund you're invested in to ensure it aligns with your anticipated retirement year.

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Invested in a single target date fund as well as other investments

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Does your investing strategy align with your goals?

How you balance and manage your investment mix (stocks, bonds, and cash) can have a big impact on your retirement savings over time. While there are many factors to consider, answering these questions can help in determining an investing strategy that works for you:

- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're invested in a target date fund as well as a mix of other investment options. A target date fund is designed to be a diversified portfolio of stocks, bonds, and cash that automatically adjusts the investment mix over time as the fund approaches its target date. Now is a good time to review your investing strategy to ensure that it aligns with your financial goals, risk tolerance, and target retirement date—and your plan offers resources that can help.

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Invested in 2 or more target date funds as well as other investments

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Does your investing strategy align with your goals?

How you balance and manage your investment mix (stocks, bonds, and cash) can have a big impact on your retirement savings over time. While there are many factors to consider, answering these questions can help in determining an investing strategy that works for you:

- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're invested in more than one target date fund as well as a mix of other investment options. A single target date fund is designed to be a diversified portfolio of stocks, bonds, and cash that automatically adjusts the investment mix over time as the fund approaches its target date. Now is a good time to review your investing strategy to ensure that it aligns with your financial goals, risk tolerance, and target retirement date—and your plan offers resources that can help.

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100% invested in 2 or more target date funds

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Does your investing strategy align with your goals?

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- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're 100% invested in more than one target date fund. A single target date fund is designed to be a diversified portfolio of stocks, bonds, and cash that automatically adjusts the investment mix over time as the fund approaches its target date. Now is a good time to review your investing strategy to ensure that it aligns with your financial goals, risk tolerance, and target retirement date—and your plan offers resources that can help.

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DIY Investor: Not invested in target date funds

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Does your investing strategy align with your goals?

How you balance and manage your investment mix (stocks, bonds, and cash) can have a big impact on your retirement savings over time. While there are many factors to consider, answering these questions can help in determining an investing strategy that works for you:

- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're managing your investments on your own. If ongoing monitoring and rebalancing are becoming challenging, your plan offers resources that can help.

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DIY Investor:Not invested in target date funds and eligible for Personalized Planning & Advice

Workshops not enabled

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- How much time do you have until retirement?
- How much tolerance do you have for risk?
- How much support do you need to manage your investments?

Your current investment strategy:

You're managing your investments on your own. Ongoing monitoring and rebalancing of your investments can be challenging, which is why your plan offers professionally managed solutions to help take on this day-to-day responsibility.

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