Match eligible
Invested aggressively

Fidelity INVESTMENTS

Jane Sample
Theta Retirement Savings Plan

Log in

It's time to review your retirement account and check your progress

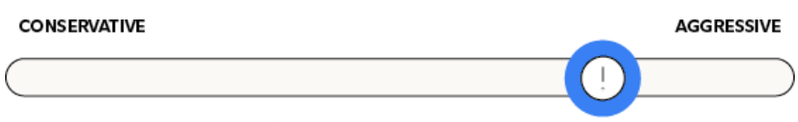
YOUR SAVINGS RATE: Needs attention



Our records show that you're leaving free money on the table by not taking full advantage of all the matching contributions your employer offers.

Get your full match

YOUR INVESTMENT MIX: Take a look



Based on what we know about your current holdings, you appear to be invested aggressively for your age. While your investment mix may be designed to maximize gains, it may also mean you're taking on too much risk. If, however, you're working with a financial advisor, this amount of risk may be in line with your unique goals.

Get investment help

The analysis above is based on assets held in your workplace savings plan and does not take into account any savings activity outside the plan or any planning discussions you may have had with your financial advisor.

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How did we score your savings and investment mix?

Investing involves risk, including risk of loss.

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Hit IRS contribution limit or tracking to hit limit
PGC retirement goal not established
Invested conservatively

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YOUR SAVINGS RATE: On target

$0



Your savings rate looks good. Now's a good time to set a retirement goal. Share a little information, get a picture of what your retirement could look like, and adjust to get where you want.

Set a goal

YOUR INVESTMENT MIX: Take a look

CONSERVATIVE AGGRESSIVE



Based on what we know about your current holdings, you appear to be invested conservatively for your age. While your investment mix may be designed to minimize risk, it may also limit your opportunity for growth. If, however, you're working with a financial advisor, this amount of risk may be in line with your unique goals.

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