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.

Get investment help

The analysis above is based on assets held at Fidelity in your Fidelity Retirement Savings Plan and does not include other accounts such as IRAs, pensions, company stock, or plans with a former employer.

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How did we score your savings and investment mix?

Investing involves risk, including risk of loss.

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This information is intended to be educational and not a full review of the investment needs of any specific investor.

Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

Asset allocation does not ensure a profit or guarantee against loss.

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Contributing 1-9.9%
On target with investing
AIP eligible; not enrolled

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YOUR SAVINGS RATE: Needs attention



You may not be saving as much as you'd like, but you're making progress. Even a 1–2% contribution increase can make a big difference over time.

Increase contribution

YOUR INVESTMENT MIX: On target



Based on what we know about your current holdings, your investment mix appears to have an appropriate ratio of stocks to other investments. If you no longer want to monitor and adjust your investments yourself, there are other ways to manage your investments that may help you stay on the right track.

Explore options

Set your contribution increase on autopilot.

You're eligible for the Annual Increase Program, a feature that helps you save more by automatically increasing your contribution rate each year toward retirement. Sign up now.

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Hit IRS contribution limit or tracking to hit limit
PGC retirement goal not established
Default asset allocation message

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Jane Sample
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Log in

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

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

When investing for the long term, asset allocation (the percentage of stocks, bonds, and other investments) is the most important factor in balancing risk and reward. We offer ways to help you manage your investments that may help you stay on the right track.

Get investment help

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