

Jane Sample  
Theta Retirement Savings Plan



## Benefit from our retirement knowledge

Your employer and Fidelity are working together to help you manage your retirement savings. Take a look below to see how you're doing, and get tips to help you maximize your savings.

It's your retirement, but it's our goal to help you get there. We can provide answers to your questions so that you feel more confident in your retirement journey. Just give us a call at **800-206-4015** or [schedule an appointment](#).

### How You're Doing

#### YOUR SAVINGS RATE: **On target**



Your savings rate looks good! Depending on your individual circumstances, consider taking it up a notch. IRS contributions max out at \$23,000.\*

[Increase your contribution »](#)

#### YOUR INVESTMENT MIX: **On target**



Based on your age, your current investment mix appears to have an appropriate ratio of stocks to other investments.

## Got markets on the mind?

Get the latest headlines and current market conditions with Market Sense, a 20-minute show to help you stay in the know.

[Watch here »](#)



The analysis above is based on assets held at Fidelity in your workplace 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 Quarterly Check-In?

The progress bars and icons shown above are for illustrative purposes only.

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

### Investing involves risk, including risk of loss.

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.

\*This limit applies to your elective contributions (the amount you choose to have withheld from your paycheck and contributed to your account). It does not include any contributions made by your employer, if offered.

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

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### How You're Doing

#### YOUR INVESTMENT MIX: **Take a look**



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.

[Get investment help »](#)

#### YOUR SAVINGS RATE: **On target**



Your savings rate looks good! Depending on your individual circumstances, consider taking it up a notch. IRS contributions max out at \$23,000.\*

[Increase your contribution »](#)

## How much cash could you have each month in retirement?

Get a quick estimate of your cash flow from savings and other income sources.

[Estimate now](#)



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### How You're Doing

#### 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 »](#)

#### YOUR SAVINGS RATE: **On target**



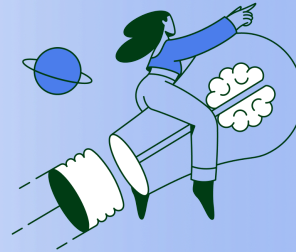
Your savings rate looks good! Depending on your individual circumstances, consider taking it up a notch. IRS contributions max out at \$23,000.\*

[Increase your contribution »](#)

## How to help your money go further

Find tips and tools to help you balance money priorities and take steps toward reaching your goals.

[Get started](#)



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### How You're Doing

#### YOUR INVESTMENT MIX: **On target**



Based on your age, your current investment mix appears to have an appropriate ratio of stocks to other investments.

#### YOUR SAVINGS RATE: **Needs attention**



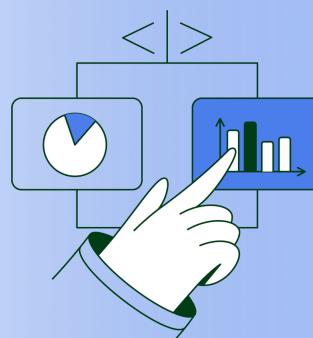
Making progress, but not quite where you want to be? That's OK. Even small changes to your savings habits can make a big difference over time.

[Increase your contribution »](#)

## Where's your money going?

Keep track of your accounts in one place. See how you can save smarter, spend better, and make progress toward your goals.

[Track your money](#)



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