

Jane Sample
Theta Retirement Savings Plan



Summer is almost here. Let's check in.

Reviewing how you're saving and investing for retirement may not be on your summer to-do list, so that's where we come in. Take a look below to see how you're doing and find steps to help you maximize your savings so that you can have the retirement you want.

Want to talk with somebody? We can help you plan for your financial goals so that you feel prepared and confident about your future. Give us a call at **800-206-4015**.

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.

Protect the people who matter to you

Having a beneficiary helps ensure that your money goes to the people you want it to go to should something happen to you. Check your beneficiaries and remember to review from time to time as well.



[Check your beneficiaries now »](#)

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.

Unless specifically agreed to in writing, Fidelity will not monitor the investments held in your account.

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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 »](#)

Add a beneficiary to your account

Don't delay designating your beneficiaries so that you know your assets will be paid to whom you want.

[Add a beneficiary »](#)



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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**



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How You're Doing

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 »](#)

YOUR INVESTMENT MIX: On target



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

Need some help? We've got you covered.

No matter what you're looking for, our collection of articles, videos, workshops, and interactive tools will help you make decisions with confidence.



[Get help »](#)

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