

Jane Sample
Theta Retirement Savings Plan



Let's check in on your progress

Saving and investing go hand in hand—and together, they can be powerful in helping your money grow.

Take a look below to see how you're doing and find steps to help you make steady progress.

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**



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

Coming soon! Discover new money skills and new possibilities

Feeling better about how you approach money can go a long way. Take the first step during Financial Literacy Month this April with tools to help you nail the basics and other resources that break down spending and saving more mindfully.

[Find out more](#)



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?

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Investing involves risk, including risk of loss.

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*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**



You may be invested too conservatively for your age, based on your current stock holdings. We can help you develop a personalized investment strategy that takes into account your unique financial situation.

[Get investment help »](#)

YOUR SAVINGS RATE: **On target**



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[Get investment help »](#)

YOUR SAVINGS RATE: **On target**



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How You're Doing

YOUR SAVINGS RATE: Needs attention



You're making good progress. Even if you're not contributing the suggested 15%[†] or more, small changes to your savings habits can make a big difference over time.

[Increase your contribution »](#)

YOUR INVESTMENT MIX: On target



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

Got markets on my mind

Inflation and indexes and earnings reports, oh my! What does it all mean for you? Get your weekly insights with Market Sense, a 20-minute show, and stay in the know about the latest headlines and market conditions.



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