



Jane Sample
Theta Savings Plan

Secure login

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



YOUR SAVINGS RATE: **On target**



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**



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.

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.

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.

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

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- Savings **on track**
- Retirement goal not set
- Investment mix **off target**: too aggressive



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YOUR SAVINGS RATE: Needs attention



Our records show that you may not be contributing the suggested 15%¹ or more—but you're getting close. Even a 1–2% contribution increase can make a big difference over time.

[Increase contribution](#)

YOUR INVESTMENT MIX: Take a look



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¹Includes employee contributions and any contributions made by the employer, if offered.

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- Savings off target: saving less than 15%, but between 10%-14%
- Investment mix off target: too aggressive