

Jane Sample  
Theta Retirement Savings Plan



## It's time to check in on your retirement savings

It's a new year and a great time to review how you're saving and investing for retirement. See how you're doing below 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 situation, you may want to consider saving even more. IRS contributions max out at \$23,500 this year.\*

[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're interested in other ways to manage your investments, check out the options available to you.

[Explore options »](#)

## Financial Wellness Month

Make money progress. Find your possible.

Whether you're tackling debt or putting a little aside for the unexpected, celebrate every step toward progress.

Visit [Financial Wellness Central](#) to learn more.



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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. If, however, you're working with a financial advisor, this amount of risk may be in line with your unique goals.

[Get investment help »](#)

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



Your savings rate looks good. Depending on your individual situation, you may want to consider saving even more. IRS contributions max out at \$23,500\* plus an additional \$11,250 because you qualify for higher catch-up contributions.

[Increase contribution »](#)

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#### 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 »](#)

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



Your savings rate looks good. Depending on your individual situation, you may want to consider saving even more. IRS contributions max out at \$23,500 this year.\*

[Increase contribution »](#)

### 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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### How You're Doing

#### 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.

### Set your contribution increase on autopilot.

Your plan is 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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