

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 »](#)

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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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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 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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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 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.



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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.

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