

# Theta Savings Plan

- Summary
- Contributions
- Investments
- Withdraw/Borrow
- Bank/Tax Information
- Plan Information

PERFORMANCE & RESEARCH PORTFOLIO ADVISORY SERVICE BROKERAGELINK®

**We're missing info**  
 Help us make sure your investment strategy fits your life. Call us or update your Investor Profile. [Review your Investor Profile](#)

Start here to keep track of everything we're doing to manage your account.

## Your progress to retirement

Estimated monthly income

**\$3,100 – \$3,800**

WEAK MARKET AVERAGE MARKET

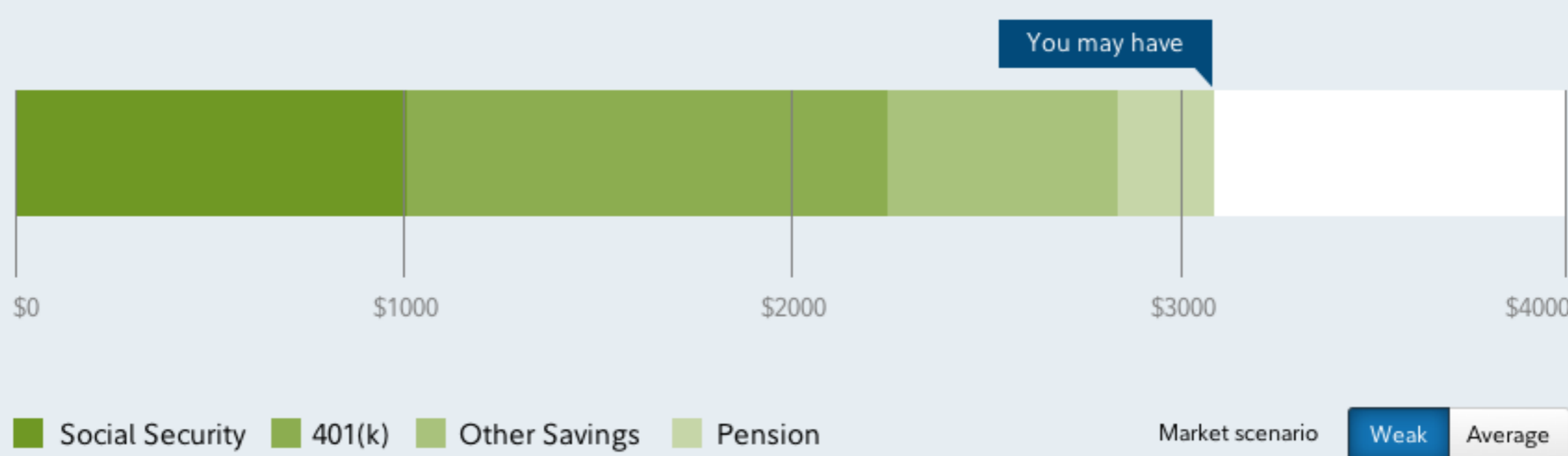
This represents the range of monthly income in today's dollars you may have in retirement based on your current savings plan.

Will this be enough?

We can help you develop a personalized retirement plan to meet your savings goals.

Give us a call at 866-811-6041 or [schedule an appointment](#)

### Retirement income sources



[Review my accounts](#)

## How we're keeping your account on track

### Monitoring and adjusting your recent activity

We monitor your account and adjust it regularly to keep aligned with your investment strategy.

[View details of our latest transactions](#)

### Notes from our portfolio managers

In spite of recent market volatility, we believe the outlook for stocks in 2016 is favorable overall.

We continue to favor developed market stocks, like those in the U.S. and Europe over emerging markets.

Within bonds, we are emphasizing investment grade corporates, which are less sensitive to interest rate risk.

Our primary objective remains the same—keeping your account aligned with your long term goals.

### Quarterly market update

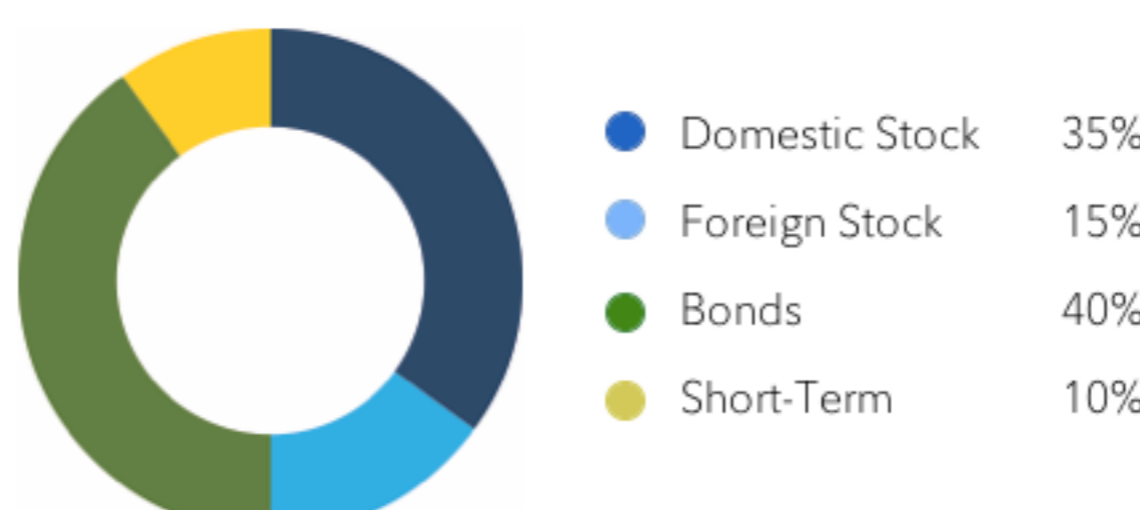
Our thoughts on recent market activity.



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### Managing your investment

We're managing your workplace managed account with a Balanced investment style. Your investment strategy and model portfolio are based on what you've told us about yourself in your [Investor Profile](#)



## Your investor profile

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### Personal Information

LOREM IPSUM

Annette Slater

CURRENT AGE	EXPECTED RETIREMENT AGE	PLANNING AGE
49	64	91

[Update](#)

#### Risk Tolerance

Average

[Update](#)

#### Income

\$70,000

[Update](#)

#### Assets

\$140,943

[Update](#)

#### Financial Situation

No info provided

[Update](#)

## The next step

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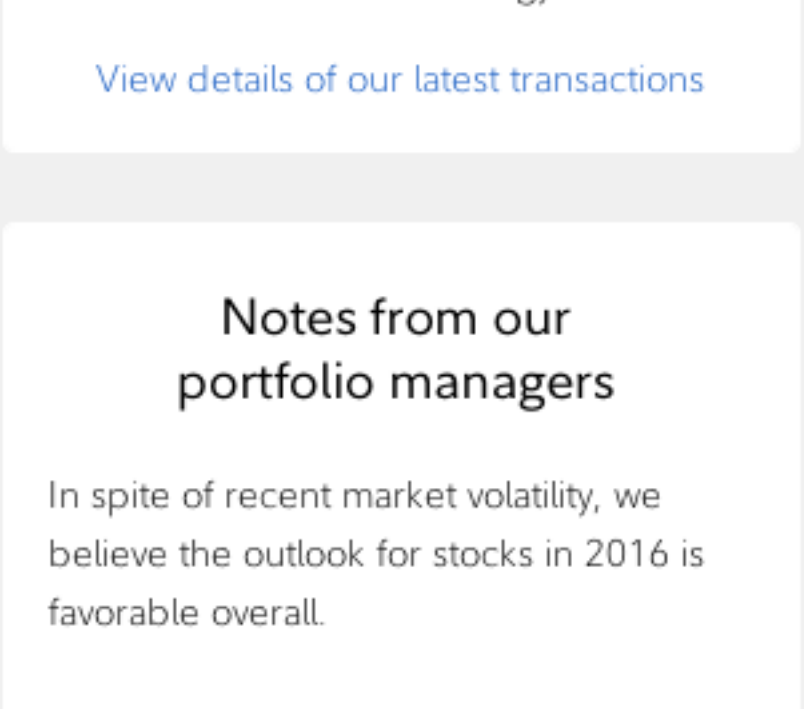
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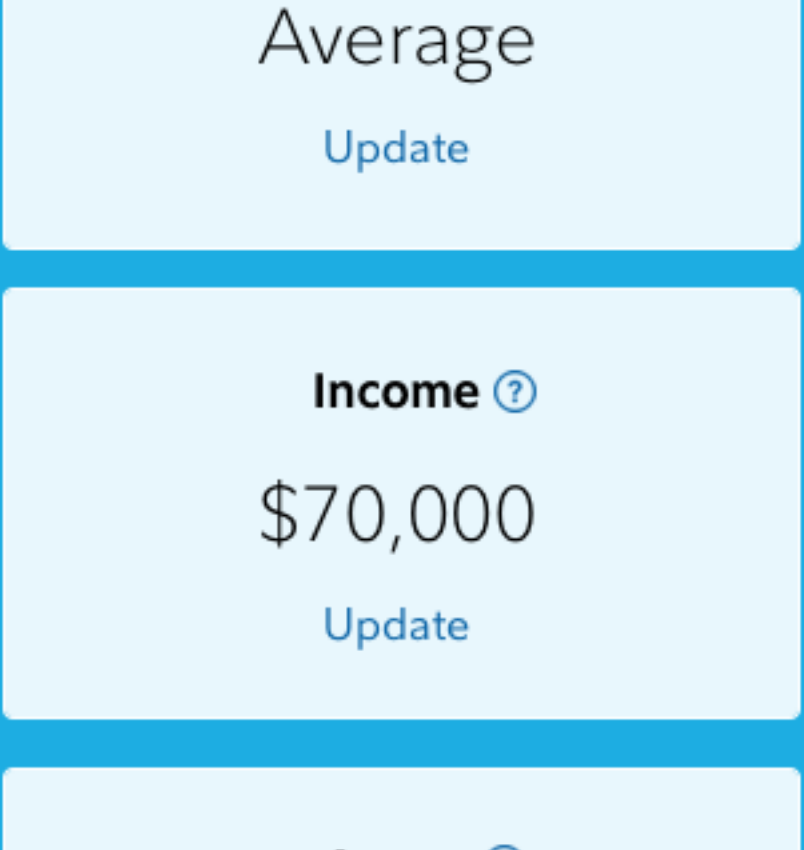
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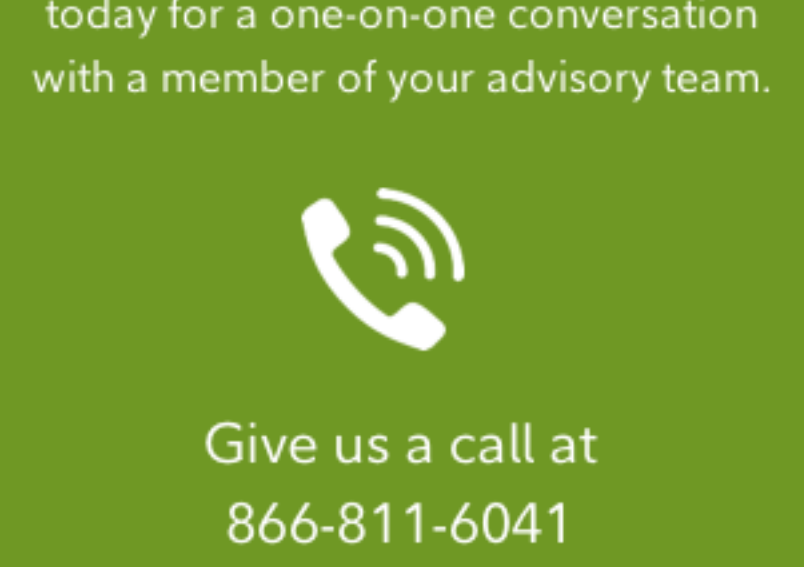
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Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

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If you continue the service after 5/23/2015, your account will be charged the full advisory fee applicable to your plan. You may cancel this service at any time without penalty. No additional communication will be sent to you at the conclusion of the offer. Mutual fund fees and expenses will still apply. This offer is subject to change or cancellation without notice.

Represents an unfunded, nonqualified plan, and no funded account has been established for you. In the event of a bankruptcy or insolvency, you would be an unsecured, general creditor of the Plan Sponsor. For more information on the plan, please refer to the plan documents.

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- PERFORMANCE & RESEARCH
- PORTFOLIO ADVISORY SERVICE
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## Welcome Annette!

Thanks for trusting Fidelity to help you reach your retirement savings goals. For more ideas and guidance, set up time today for a one-on-one conversation with a member of your advisory team.

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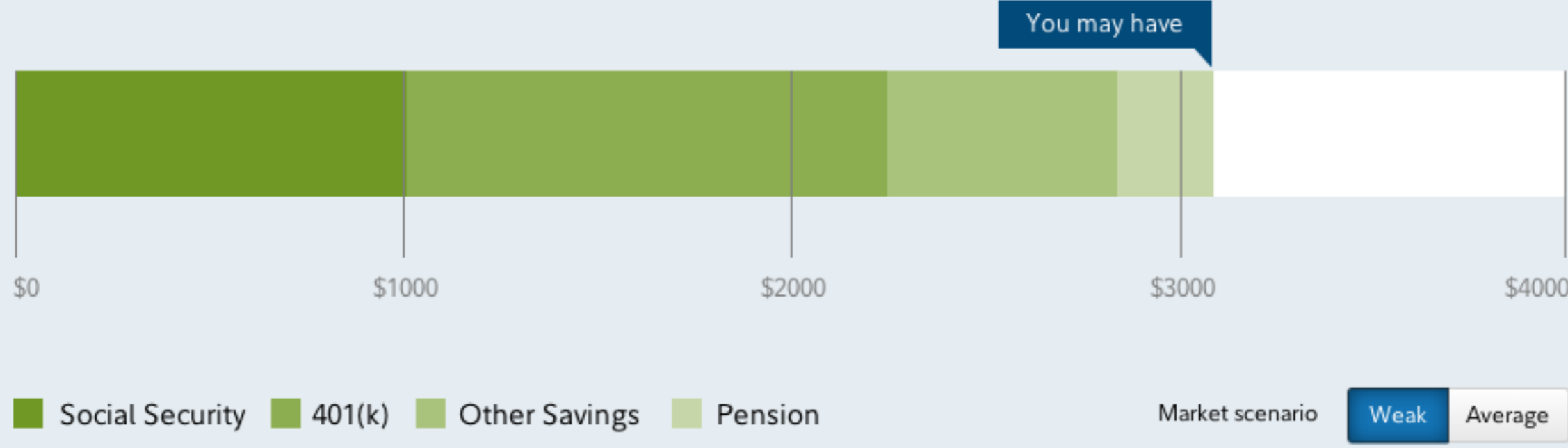
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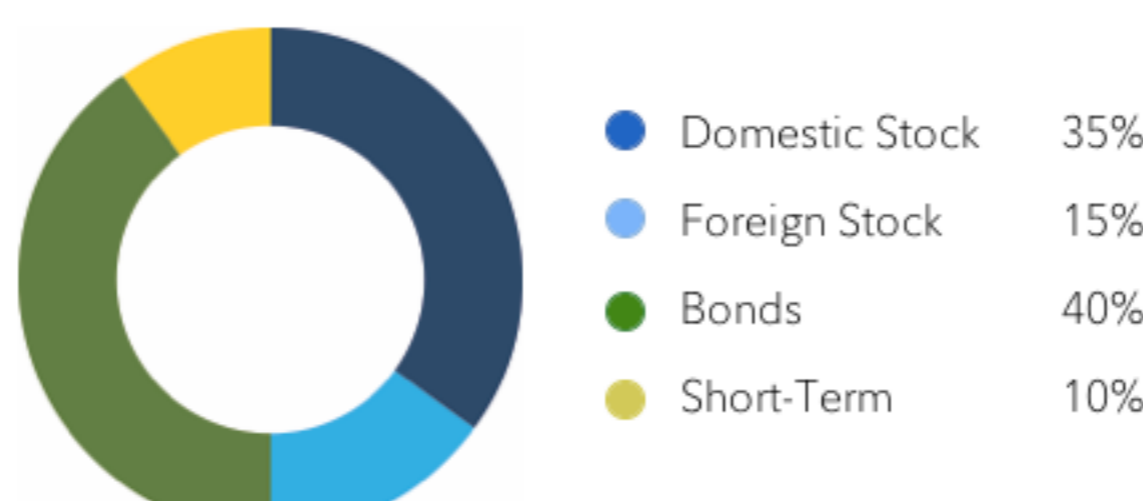
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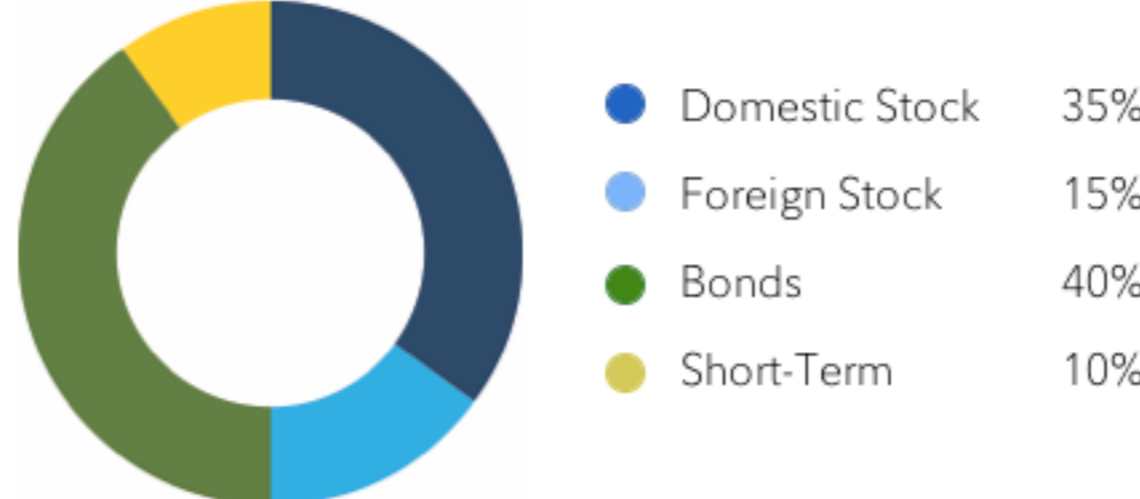
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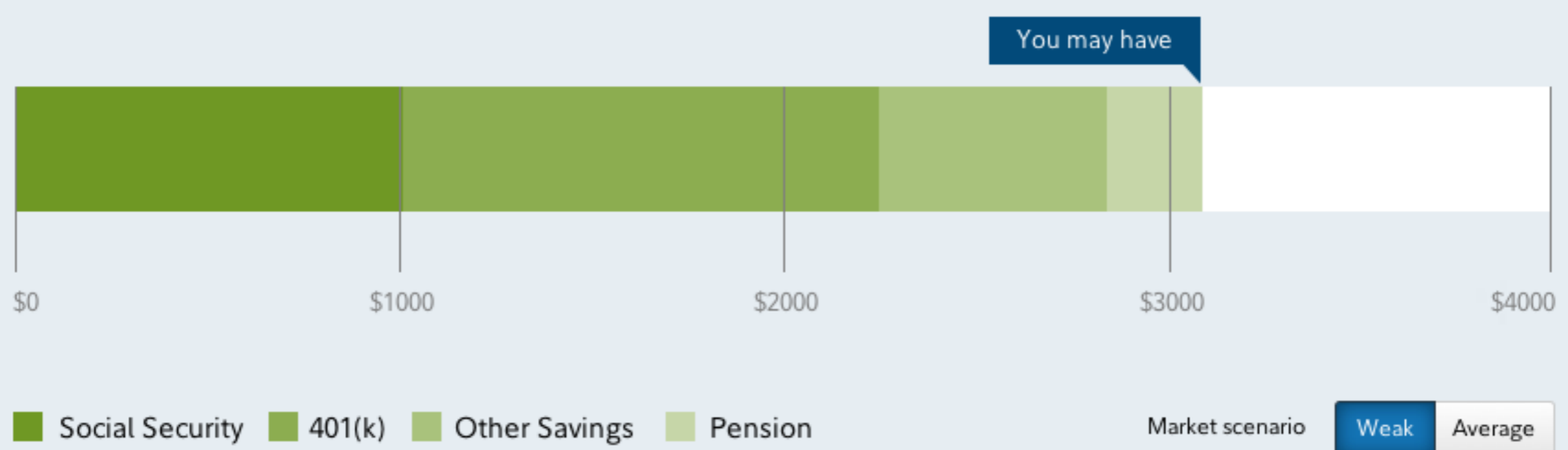
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