

# Your financial wellness dashboard

Take charge of your money with financial help that evolves with you



Explore simple tools, useful tips, and help when you need it—all in one place on NetBenefits®.



SCAN to get started. Hover your phone's camera over the code.  
**No app needed.**

## Work toward your goals

Set goals that matter to you, track progress, and celebrate milestones along the way

## Explore financial wellness

Find resources that help you manage your money in ways that work for you

## Plan for the future

Make confident steps toward the future you want with simple tools and personalized insights



The screenshot shows the Fidelity NetBenefits dashboard for Theta Corporation. The main section is titled "Your financial wellness dashboard" and features a chart titled "What could your savings be over time?". The chart shows a projected savings growth from 2021 to 2078, with a vertical line indicating the retirement goal date of 2048. The chart includes a legend for "Significantly below average market", "Below average market", and "Average market". Below the chart is a "Go to your retirement goal" button.

Other sections include:

- Net worth:** As of 10/30/2024, \$497,554.76. Assets: \$560,054.76. Liabilities: -\$62,500.00. A "View details" button is present.
- Compare your retirement savings with your peers:** Age: 35-39 | Income: \$75,000-\$100,000. Top savers contribution rate and balance: 8% (\$178,900). Your contribution rate and balance: 7% (\$98,700). Average savers contribution rate and balance: 4% (\$65,400). A "Change contribution rate" button is present.
- Put together an investment strategy:** A "Create a strategy" button is present.
- Your goals:** Balances as of 10/30/2024. Retirement goal: Retire at 67 in 2045, \$999,999,999.99 Total saved. On target. Score last run 10/30/2024. View details. Savings goal: Target start date 2030, \$999,999,999.99. 20% of \$20,000.00 saved. View details.

Investing involves risk, including risk of loss.

Screenshot is for illustrative purposes only.

IMPORTANT: The projections or other information generated by the Planning & Guidance Center's Retirement Analysis regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Your results may vary with each use and over time.

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