

1 Confirm Your Information

2 Review Your Strategy

3 Finalize Your Strategy

Service Selected: Managed by You

The following retirement strategy is designed to help you achieve an annual Retirement Income Outlook of **\$59,047**. Please click Finish to finalize this strategy.

We will do the following:

1. Adjust Your Investment Lineup

401(K) SAVINGS PLAN

Investment Name	Proposed (?) Reallocation %	Future (?) Allocation %
<u>American Funds New World A (5)</u>	5	5
<u>Harbor Capital Appreciation Instl (5)</u>	5	5
<u>Morgan Stanley Inst US Real Estate I</u>	4	4
<u>PIMCO Total Return Instl (5)</u>	25	25
<u>T. Rowe Price Small-Cap Stock</u>	13	13
<u>Tweedy, Browne Global Value (5)</u>	19	19
<u>Vanguard 500 Index Admiral</u>	29	29
Total	100	100

[View an asset mix X-ray of your account](#)

[See important disclosure information](#)

You will need to do the following:

1. Set Your Savings Rate

Contact your account administrator to make the following changes.

You are currently enrolled in a program that will automatically increase your savings by 2% each year until you reach 8%.

2. Download a PDF of your retirement strategy for your records. [Download PDF](#)

3. Verify Email Preferences [View Preferences](#)

Exit

<< Back

Finish >>

[Messages & Reports](#) / [Investment Research](#) / [Learning Station](#) / [Glossary](#)

[Privacy Policy](#) / [Advisory Agreement](#) / [Methodology](#) / [About Us](#) / [Tech Requirements](#)

©2012 Morningstar Associates, LLC. All rights reserved. Investment advisory services are provided by Morningstar Associates, LLC, a registered investment advisor and wholly owned subsidiary of Morningstar, Inc.