

1 Confirm Your Information

2 Review Your Strategy

3 Finalize Your Strategy

## Retirement Strategy Overview (?)

This is a comparison of our proposed strategy with your current strategy (if available). You can adjust our proposed strategy by editing the underlying components.

	Current	Proposed
<b>Overall Rating</b> (?)	★★	★★★
<b>Retirement Income Outlook</b> (?)	\$55,482/yr	\$59,048/yr
Retirement Income Goal	\$95,057/yr	\$95,057/yr
<b>Savings Rate</b> (?)	8% by 2012	8% by 2012
<b>Asset Mix/Risk Level</b> (?)	Balanced	Aggressive
<b>Investment Selections</b> (?)	Good	Excellent

## Retirement Income Outlook

### Savings Rate (?)

### Asset Mix/Risk Level (?)

### Investment Selections (?)

Exit

<< Back

Next >>

This overall rating is completely distinct from the well-known star rating for mutual funds issued by Morningstar, Inc.

**\*IMPORTANT: Morningstar Retirement Manager's projections and other information, including the Retirement Income Outlook, are hypothetical in nature, do not reflect actual results (including investment results), and are not guarantees of future results. Results may vary with each use and over time.** Your proposed investment allocation is created by applying your recommended asset mix (which considers the forecasts and assumptions about the growth of your wealth) to your investment options. Your recommended asset mix is derived from various factors such as your years to retirement, your projected salary growth, and results from an "asset-liability analysis." The "asset-liability analysis" is an economic concept that is helpful in understanding your ability to withstand financial losses by incorporating a projected future stream of income into your current financial situation. The investments considered are limited to those investment options that are available to you. (In certain instances, investment options such as lifestyle or custom funds may not be considered if data for such funds are not available. Please contact your plan or account administrator for information specific to your account.) Each investment option is assigned a 'fund score' through a proprietary algorithm; the 'fund score' of each investment option may change with each use and over time. Other than the 'fund score', certain investment options are not favored over others. We encourage you to review the Methodology document for detailed information about the tool's forecasts and assumptions.

[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.