Morningstar® Retirement Manager℠

ABCo. | MORNINGSTAR®

1 **Confirm Your Information** 2 Review Your Strategy 3 Finalize Your Strategy

Verify Required Information

Change Retirement Account Details (?)

401(K) SAVINGS PLAN

Total balance (?)	**$40,000**

Annual Pre-Tax and/or Roth Employee Savings Rate (?)	Edit
Current (% of salary)	3
Proposed (by 2015)	8
Annual increase	2

Annual Post-Tax Employee Savings Rate (?)	Edit
Current (% of Salary)	0
Maximum (% of Salary)	100

Annual Employer Pre-Tax and/or Roth Savings Rate Match (?)	Edit
70% of the first 4% of salary contributed	
50% of the next 4% of salary contributed	

Combined Pre-Tax, Roth, and Post-Tax Plan Limits (?)	
Combined plan max limit (% of salary)	100

Brokerage Window Balance (5)(?)	Edit
Total Balance	$100,000

Loans Taken From Account (?)	Edit

Investments to Exclude From Strategy (?)	Edit

Include Spouse/Partner Information (?)

Add Additional Accounts/Income Sources (?)

Adjust Risk Level (?)

Exit

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