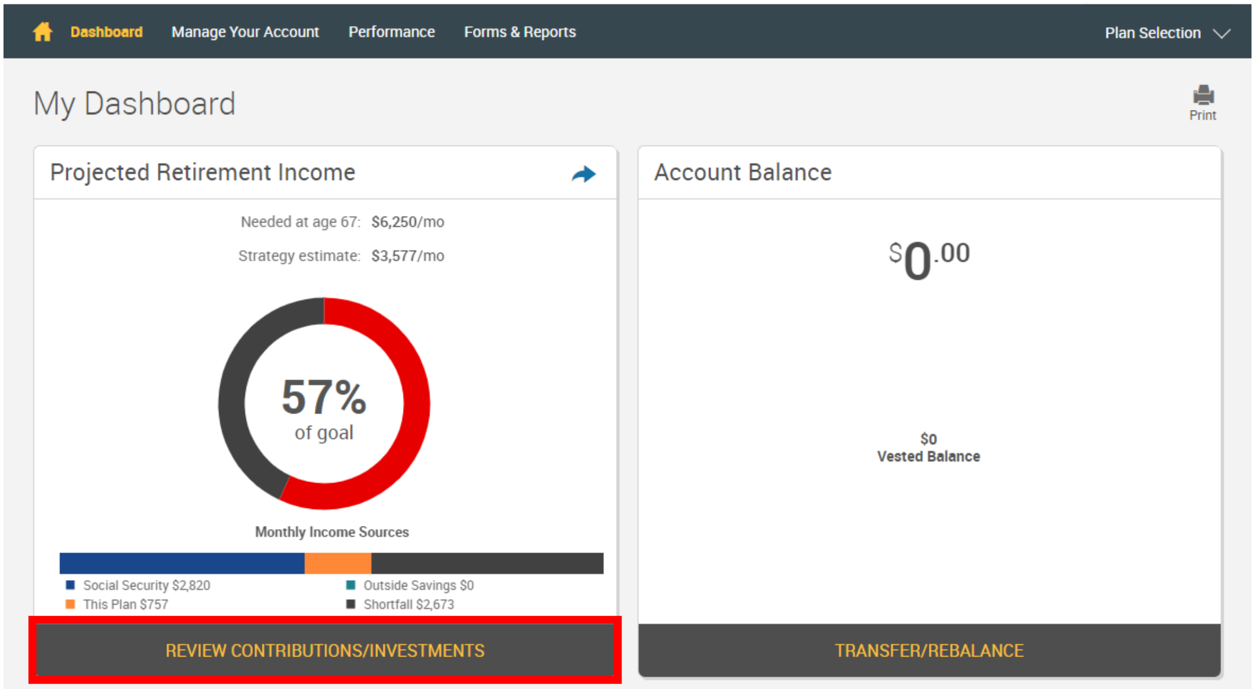
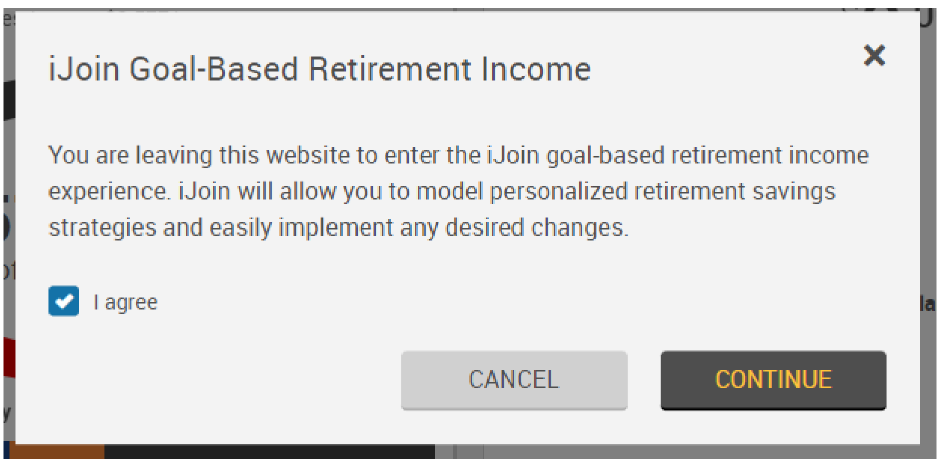
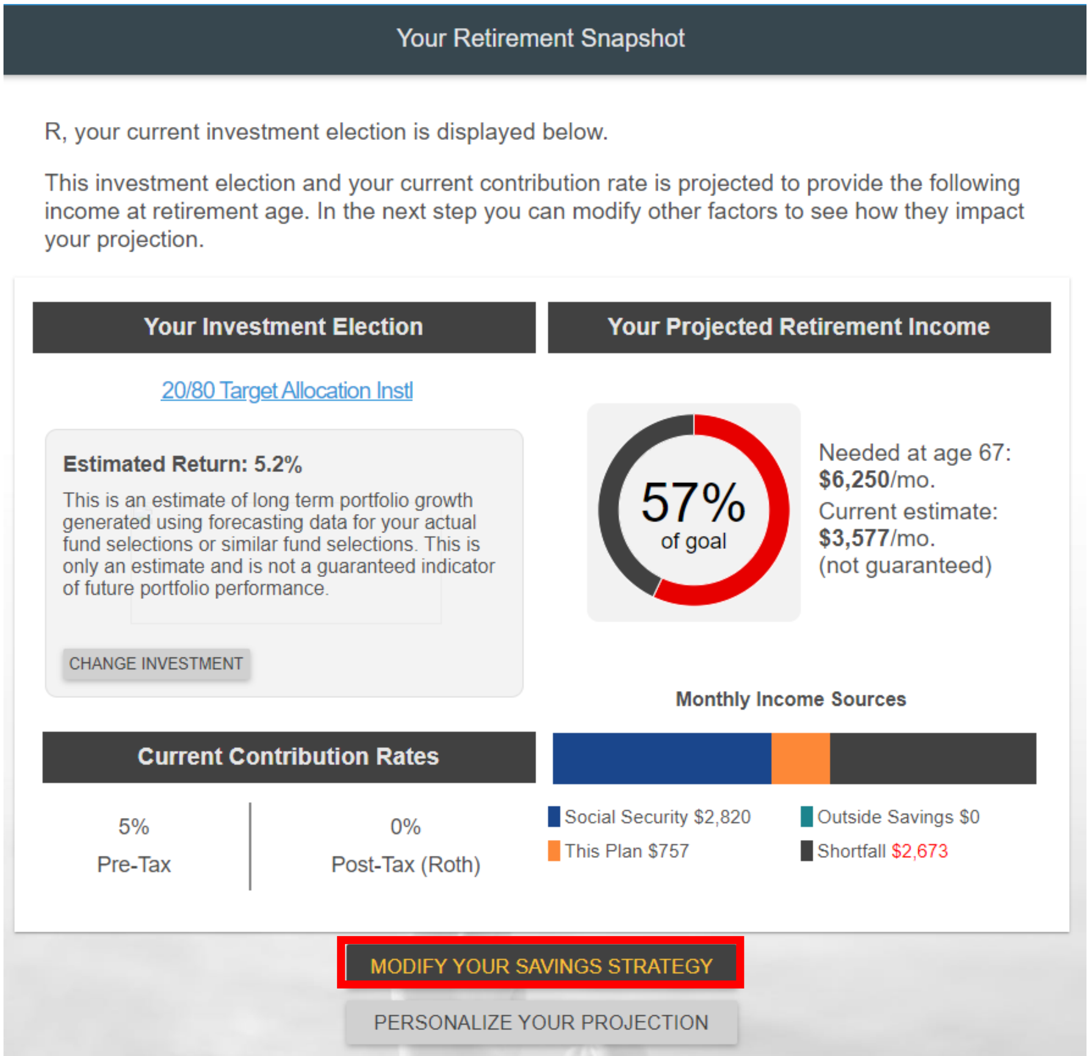
Step 1:



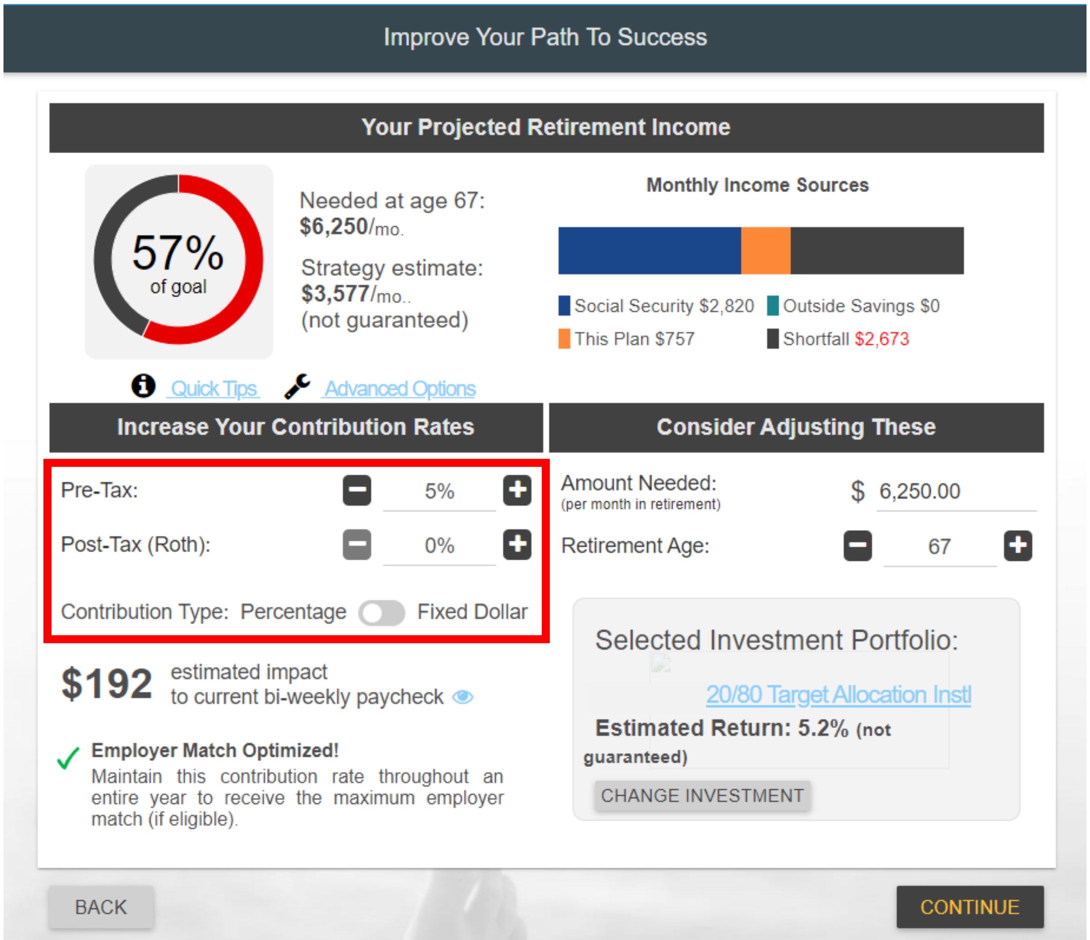
This will take you to the iJoin website



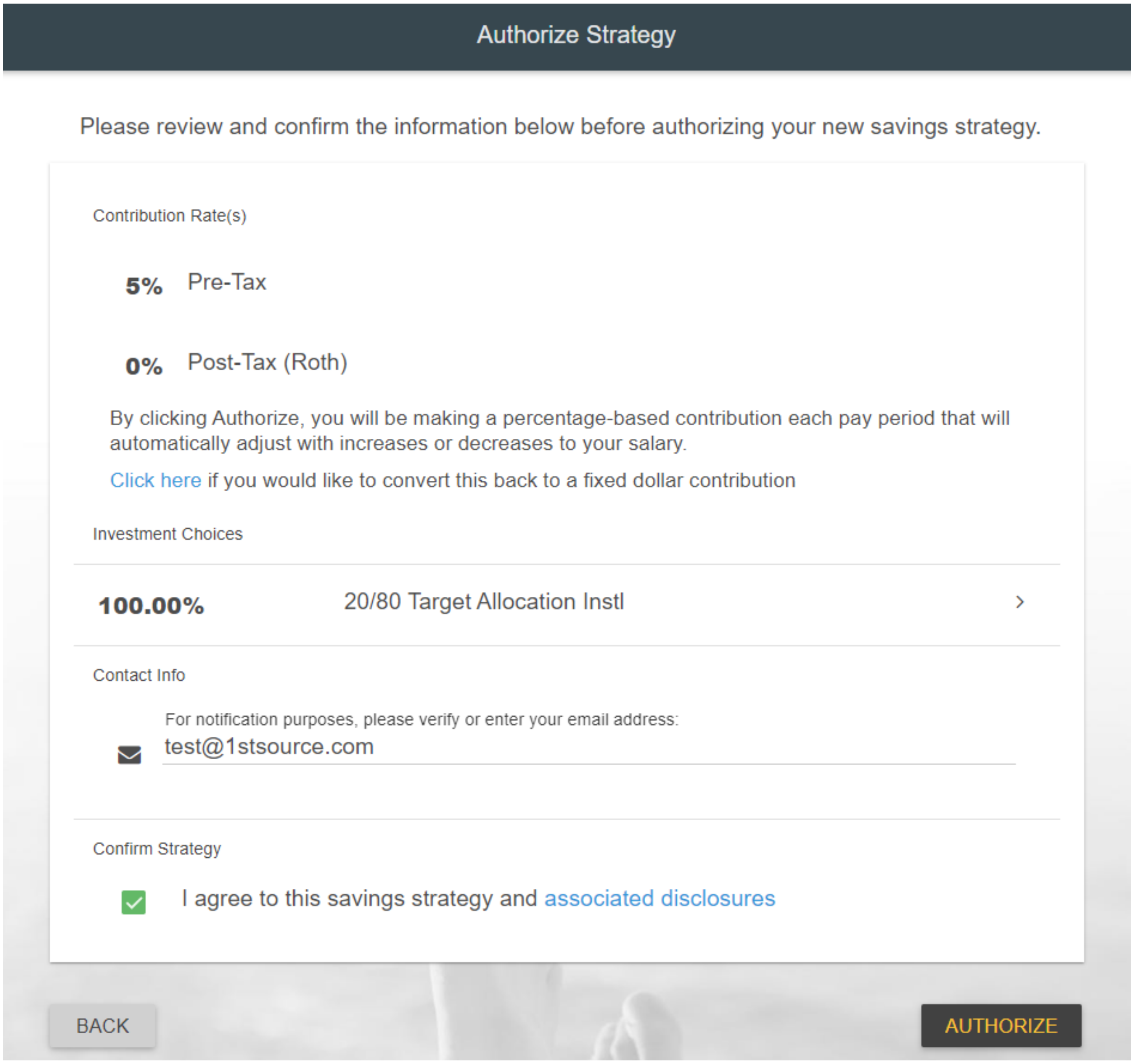
Step 2:


Your Retirement Snapshot
R, your current investment election is displayed below.
This investment election and your current contribution rate is projected to provide the following income at retirement age. In the next step you can modify other factors to see how they impact your projection.
Your Investment Election
20/80 Target Allocation Instl
Estimated Return: 5.2%
This is an estimate of long term portfolio growth generated using forecasting data for your actual fund selections or similar fund selections. This is only an estimate and is not a guaranteed indicator of future portfolio performance.
CHANGE INVESTMENT
Your Projected Retirement Income
57% of goal
Needed at age 67: $6,250/mo.
Current estimate: $3,577/mo. (not guaranteed)
Monthly Income Sources
Social Security $2,820
Outside Savings $0
This Plan $757
Shortfall $2,673
Current Contribution Rates
5% Pre-Tax
0% Post-Tax (Roth)
MODIFY YOUR SAVINGS STRATEGY
PERSONALIZE YOUR PROJECTION

Step 3:


Improve Your Path To Success
Your Projected Retirement Income
57%
of goal
Needed at age 67:
$6,250/mo.
Strategy estimate:
$3,577/mo..
(not guaranteed)
Monthly Income Sources
Social Security $2,820
Outside Savings $0
This Plan $757
Shortfall $2,673
Quick Tips
Advanced Options
Increase Your Contribution Rates
Pre-Tax: 5%
Post-Tax (Roth): 0%
Contribution Type: Percentage Fixed Dollar
$192 estimated impact
to current bi-weekly paycheck
Employer Match Optimized!
Maintain this contribution rate throughout an entire year to receive the maximum employer match (if eligible).
Consider Adjusting These
Amount Needed:
(per month in retirement)
$ 6,250.00
Retirement Age: 67
Selected Investment Portfolio:
20/80 Target Allocation Instl
Estimated Return: 5.2% (not guaranteed)
CHANGE INVESTMENT
BACK
CONTINUE

Final step:


Authorize Strategy
Please review and confirm the information below before authorizing your new savings strategy.
Contribution Rate(s)
5% Pre-Tax
0% Post-Tax (Roth)
By clicking Authorize, you will be making a percentage-based contribution each pay period that will automatically adjust with increases or decreases to your salary.
Click here if you would like to convert this back to a fixed dollar contribution
Investment Choices
100.00% 20/80 Target Allocation Instl
Contact Info
For notification purposes, please verify or enter your email address:
test@1stsource.com
Confirm Strategy
I agree to this savings strategy and associated disclosures
BACK
AUTHORIZE