

Your future, your way

.....
Helpful online and mobile resources

401(k) Account

Franklin Login - ABC Test DEFINED CONTRIBUTION PLAN - Account #: 397011



- Overview ▾
- Contributions ▾
- Investments ▾
- Loans & withdrawals
- Rollovers
- Planning resources ▾

2 3 4 [Guided tour](#)

Your account As of April 07, 2022

\$189,302.63

Vested balance ⓘ \$117,403.53 >

Personalized rate of return ⓘ ↑ 5.47% >
since Jan. 01, 2021

Gain/Loss ⓘ ↓ -\$11,829.06 >
since Jan. 01, 2022

Most recent deposit - >

Your current salary \$39,900.00 ✎

Desired retirement age Age 65 ✎

[View statements](#)

Plan your retirement

Check in on your progress toward your retirement goals with the Retirement Wellness Planner.

[Plan now >](#)

87 My progress
Performance
4 Compare me

Am I saving enough to replace my income?

Your Retirement Wellness Score shows your progress toward your goal of replacing 80% ⓘ of your income in retirement. See everything that goes into calculating your score and make adjustments in the **Retirement Wellness Planner**.

87%

1 You're projected to replace 87% of your income in retirement. ⓘ

You'll need
\$3,084 / month

You'll have
\$3,342 / month

You are on track!
\$258 extra / month

3 You're currently contributing 17% of pay plus \$50 per paycheck across these **contribution types**

-

17%

+

\$ 50
per paycheck

See how small changes can make a big impact

You're doing great but even a little change can make a big difference in the long run. Consider increasing your contribution rate.

Rollover in progress

We got your request and will let you know when your rollover is complete.

[See rollover details](#)

Financial Wellness 5

We know there's a lot to think about when it comes to your finances. Get help on the topics you're interested in with resources from Principal® Milestones. You'll find articles, videos, calculators, worksheets, and more, all designed to help you navigate your financial journey, wherever you are on the pathway.

Select topics that you're interested in to filter your results.

All topics

Budgeting

Creating a budget and sticking to it

15 min course

Budgeting

A budget is the basis of a solid financial wellness plan. Learn how to get started with creating a budget that works for you.

Get a holistic view of your retirement savings – Retirement Wellness Planner

Interactive tool

Saving for retirement

Want to dig into how your unique

Quiz – What's your investor personality?

Interactive tool

Budgeting

Get a better understanding of what behaviors may influence the way you prefer to invest. Once you have an idea of what makes you

For illustrative purposes only.

Log in to your account at [principal.com](https://www.principal.com) to see all of the tools and resources you can use at home or on the go to help plan for your future.

- 1 Retirement Wellness Score:** Your score is an educational and personalized representation of your financial health in retirement based on your account balance, salary and other details. Unlock your score to see how ready you may be for retirement.
- 2 Guided Tour:** Get to know all the resources at your fingertips. Click anytime for a guided tour of your account. Learn how to update your profile, get account information, view your statement, access the Education Hub, and more.
- 3 Improve your score:** Explore how changes to your contribution rate can make a big difference for your financial future. Go even further by launching the Retirement Wellness Planner to see your full retirement snapshot.
- 4 Compare me:** Not sure if you're on track with your savings? Use the peer comparison to see how you stack up to your on-track peers.
- 5 Principal® Milestones:** Access financial wellness resources available through Principal® Milestones.

By launching the Retirement Wellness Planner, you can see more features and discover all of the ways you can personalize your score.

- 6 Visualize your projected progress:** Take a look at the graph to see your estimated retirement savings and monthly income in retirement through the years.
- 7 Retirement Outlook Report:** Use this real-time report to identify any potential gaps in retirement income and see how small changes to your deferral could help. You can even print your personalized report to take with you when you meet with your financial professional.
- 8 Unlock your Household Retirement Wellness Score:** Get a better idea of your total financial picture by calculating your Household Score. Just add your spouse or partner's salary information and retirement goals to see how your joint household stacks up.
- 9 Link additional savings accounts:** Add information on accounts outside Principal® under "External Accounts" to get a more holistic picture of your retirement readiness. You can link your account information and we'll keep it updated for you or you can manually enter the amounts.

DID YOU KNOW?

You can adjust your desired retirement age: Update your retirement age under "Advanced Planning Inputs" to see how it could impact your score.

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Retirement Wellness Planner

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[Retirement Outlook Report](#)

[Print](#)

Ever considered using your health savings account (HSA) to help pay for future healthcare costs? Add or link your HSA on the **external accounts** page to see what it can do for your Retirement Wellness Score.

Working on your plan for retirement is a great idea, Franklin! Simply adjust information below and watch how your Retirement Wellness Score can improve. It only takes a few minutes to see how simple changes now can help boost your financial security in retirement.

Planning & Account Inputs ▾

External Accounts ▾ 9

Additional Principal Accounts ▾

Household Inputs ▲

Enter your spouse or domestic partner's information to see your Household Retirement Wellness Score.

Their Current Age ⓘ

Their Desired Retirement Age ⓘ

Their Ongoing Contribution Amount ⓘ

Their Current Annual Pay ⓘ

Their Retirement Savings Balance ⓘ

Their Social Security Monthly Income ⓘ

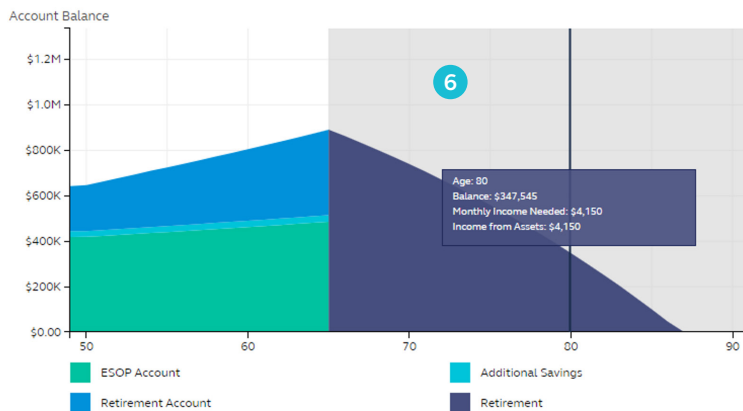
Their Defined Benefit Monthly Income ⓘ

[Clear Changes](#)

[Save Changes](#)

Retirement Wellness Score ⓘ

| | | | |
|-----------|---|---|---|
| <p>87</p> | <p>You Need ⓘ</p> <p>\$3,084/month in retirement</p> <p>If you spend this much, your savings may run out by age 87.</p> | <p>We Estimate You Will Have ⓘ</p> <p>\$3,342/month in retirement</p> | <p>You Are On Track!</p> <p>\$258/month extra in retirement</p> |
| | <p>8 Household Score ⓘ</p> | | |



All amounts illustrated in this chart are estimates.

If including retirement income accounts that are held outside Principal®, know that certain types of accounts generally provide retirement income for a set amount of time.¹

[Asset View](#)

[Income View](#)

[Today's Dollars](#)

[Future Dollars](#)

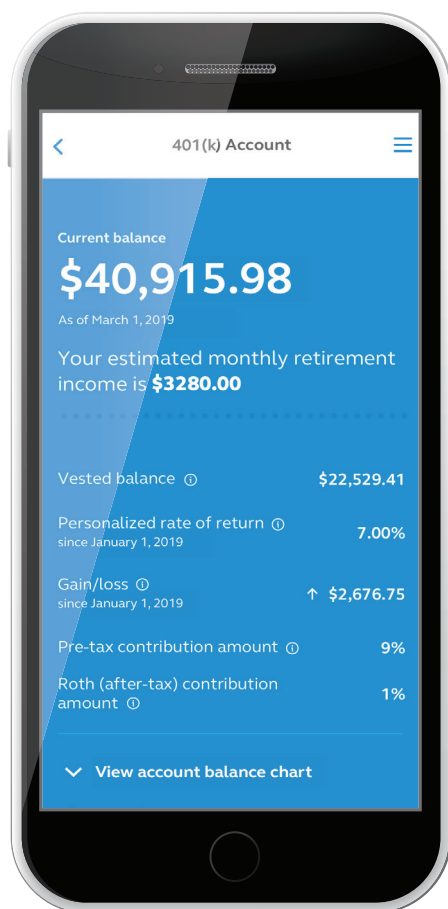


FREQUENTLY ASKED QUESTIONS

If you have a question about this chart, check out our [frequently asked questions](#).

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 **24/7** account access

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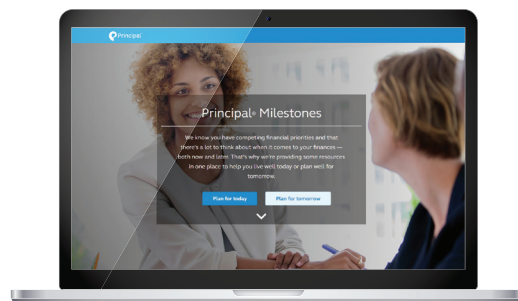
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Use the resources to help learn about:

- Building a budget
- Downsizing debt
- Understanding your credit score
- Saving for retirement
- Saving for learning
- Covering your health
- Building emergency savings



Visit principal.com/Milestones to explore how these resources can help you today and tomorrow.



While you're there, enable our Principal® Flash Briefing skill via Amazon Alexa. Each week you'll get retirement planning tid bits and financial tips all by just asking Alexa.

Principal® Flash Briefing — Tips, fun facts, and reminders for weekly financial education without lifting a finger. (only on Amazon Alexa)

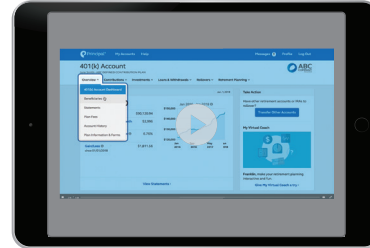
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