

(1) When do you plan to retire? (if you've already retired, enter the date you retired)

01 / 2025

(2) Risk Preference?

- Defensive/Conservative (Recommended)
- Moderate/Average
- Aggressive/Growth

(3) Funds?

- Lowest Cost (Recommended)
- Schwab
- Vanguard
- Fidelity
- Environmental, Social, and Governance

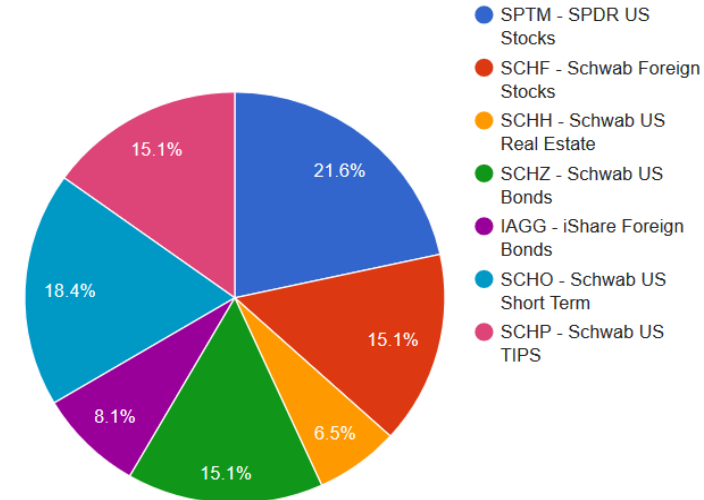
## Sample Report Request

Allocation	Ticker (Click for details)	Asset	Vendor	Fee
43% Equity				
21.6%	<a href="#">SPTM</a>	US Stocks	SPDR	3
15.1%	<a href="#">SCHF</a>	Foreign Stocks	Schwab	6
6.5%	<a href="#">SCHH</a>	US Real Estate	Schwab	7
23% Bond				
15.1%	<a href="#">SCHZ</a>	US Bonds	Schwab	4
8.1%	<a href="#">IAGG</a>	Foreign Bonds	iShare	9
34% Cash				
18.4%	<a href="#">SCHO</a>	US Short Term	Schwab	6
15.1%	<a href="#">SCHP</a>	US TIPS	Schwab	5

**Total Fee (bps): 5.2**

**( Average target date fund fee is 80 basis points )**

Fund Allocation



*These allocations and funds are examples, provided for educational purposes only. You should choose your own allocations and funds.*