

Planning & Education

The screenshot displays the Wells Fargo Planning & Education interface. The top navigation bar includes links for Sign Off, Site Map, and Contact Us. The main menu highlights the Planning & Education section. The Education Resource Center sidebar on the left contains links to the Retirement Quick View Calculator and the Education Resource Center. The Retirement Services section shows the Planning & Education tab selected. The Retirement Quick View Calculator is the central focus, featuring input fields for Current Age (52), Current Annual Income (\$45,000), Retirement Age (65), and Life Expectancy (85). It displays Retirement Savings for Traditional IRAs, Roth IRAs, and Employer Plans. A summary table shows the estimated monthly amount needed at retirement (\$4,410) and extra monthly savings needed to reach the goal (\$1,210). A bar chart illustrates the projected savings and shortfall over time, with Social Security and Pension contributions shown in blue, Savings in green, and Shortfall in red.

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Account Summary | My Account | Actions & Investments | Loans | Plan Information | **Planning & Education**

Education Resource Center
Retirement Quick View Calculator

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Retirement Services
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Education Resource Center
Retirement Quick View Calculator

Retirement Planning
Prepare for Retirement
Manage Retirement Assets
Age-specific tips and checklists

Other Financial Priorities
Save for College
Finance Major Purchases
Plan for Life Events
Evaluate Insurance Options
Plan Your Estate

Retirement Quick View Calculator

Current Age: 52
Current Annual Income: \$45,000
Retirement Age: 65
Life Expectancy: 85

Retirement Savings

Traditional IRAs
Current Balance: \$
Annual Contributions: \$

Roth IRAs
Current Balance: \$
Annual Contributions: \$

Employer Plans 401(k), 457, etc.
Current Balance: \$87,449
Payroll Deduction %: 4%
Company Matching %: 3.50%

Other Savings investments, savings, etc.
Current Balance: \$0
Additional Annual Savings: \$

Rate of Return

Estimated monthly amount needed at retirement: \$4,410

Extra monthly savings needed to reach goal: \$1,210

Total savings projected at retirement: \$291,000

Savings projected to be depleted by age: 74

Needs **Savings**

Age

Social Security **Pension** **Savings** **Shortfall**

Age	Social Security	Pension	Savings	Shortfall
65	\$10K	\$10K	\$10K	\$10K
67	\$10K	\$10K	\$10K	\$10K
69	\$10K	\$10K	\$10K	\$10K
71	\$10K	\$10K	\$10K	\$10K
73	\$10K	\$10K	\$10K	\$10K
75	\$10K	\$10K	\$10K	\$10K
77	\$10K	\$10K	\$10K	\$10K
79	\$10K	\$10K	\$10K	\$10K
81	\$10K	\$10K	\$10K	\$10K
83	\$10K	\$10K	\$10K	\$10K

Use the Retirement Quick View Calculator

- Estimates savings at retirement
- Calculates savings gap and amount needed to meet savings goal
- Assesses how long your retirement savings may last

Retirement Quick View Calculator

Current Age	<input type="text" value="52"/>
Current Annual Income	\$ <input type="text" value="45000"/>
Retirement Age	<input type="text" value="65"/>
Life Expectancy	<input type="text" value="85"/>

Retirement Savings

Traditional IRAs	
Current Balance	\$ <input type="text"/>
Annual Contributions	\$ <input type="text"/>
Roth IRAs	
Current Balance	\$ <input type="text"/>
Annual Contributions	\$ <input type="text"/>
Employer Plans 401(k), 457, etc.	
Current Balance	\$ <input type="text" value="87449"/>
Payroll Deduction %	<input type="text" value="4"/> %
Company Matching %	<input type="text" value="3.50"/> %

Other Savings investments, savings, etc.

Current Balance	\$ <input type="text" value="0"/>
Additional Annual Savings	\$ <input type="text"/>

Rate of Return

Between now and the time you retire	<input type="text" value="7"/> %
During your retirement years	<input type="text" value="4"/> %
Revise Social Security	
Add a Lump Sum Amount	
Edit Pension	

Estimated monthly amount needed at retirement	Extra monthly savings needed to reach goal
\$4,410 ?	\$1,210 ?
Total savings projected at retirement	Savings projected to be depleted by age
\$291,000 ?	74 ?

Needs

Savings

Helping you achieve a financially secure retirement.

Call us to discuss getting on track to meet your retirement goal.

[View Detailed Print Summary](#)

Examples are for illustration purposes only. Estimates are based on the assumptions noted, do not guarantee or imply a projection of actual results, and do not include the effect of taxes. Wells Fargo cannot guarantee results under any savings or investment program and cannot guarantee that you will meet your retirement savings goal.

Retirement Quick View Calculator

Key figures

Start with a few basics

Input IRA information

401(k) plan information pre-populated for you

Add outside saving; include any spouse plan(s)

Adjustable rates of return

Current Age
 Current Annual Income \$
 Retirement Age
 Life Expectancy

Retirement Savings

Traditional IRAs
 Current Balance \$
[Annual Contributions](#) \$
Roth IRAs
 Current Balance \$
[Annual Contributions](#) \$

Employer Plans 401(k), 457, etc.
 Current Balance \$

Other Savings investments, savings, etc.

[Current Balance](#) \$
[Additional Annual Savings](#) \$

Rate of Return

[Between now and the time you retire](#)
 %

[During your retirement years](#)
 %

[Revise Social Security](#)
[Add a Lump Sum Amount](#)
[Edit Pension](#)

Estimated monthly amount needed at retirement

\$4,410

Extra monthly savings needed to reach goal

\$1,210

Total savings projected at retirement

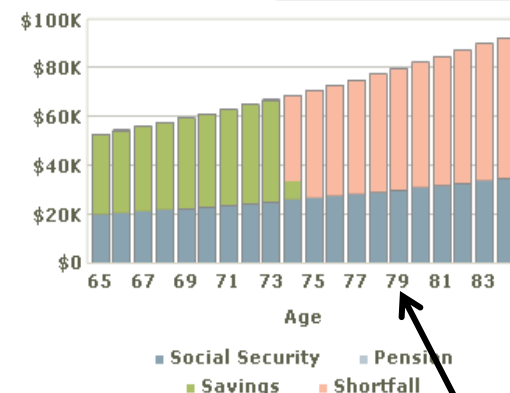
\$291,000

Savings projected to be depleted by age

74

Needs

Savings



Helping you achieve a financially secure retirement.

Call us to discuss your goal.

▶ 1-866-6
 ▶ 7AM - 1

Estimated sources of savings needs

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