

Fidelity Calculators and Tools

[Your Contribution Maximizer](#)

Use this tool to help you maximize your contributions by calculating amounts and looking at IRS limits.

[Take Home Pay Calculator](#)

See how your pre-tax contribution might affect your take-home pay.

[Power of Small Amounts](#)

Use this interactive tool to see how increasing your contribution rate by 1%, 3% or 5% can make a big difference in preparing for your future.

[Spending Dashboard](#)

Gain clarity around how much you're spending across categories to help make informed adjustments.

[Roth Conversion Calculator](#)

Understand the potential outcomes that a Roth Conversion could have on your financial outlook so you can decide whether one is right for you.

[The Fidelity Retirement Score](#)

Get a snapshot of your retirement just by answering six quick questions.

[Financial Wellness Checkup](#)

Answer a few questions to see your personal financial wellness score in each of our 4 categories: budgeting, debt management, savings, and protection.

[Planning & Guidance Center](#)

Get a holistic view of your financial plan and explore different investment strategies that can help you stay on track.

[College Savings Calculator](#)

Use this tool to see if you're on track to meet your college savings goals.

[Estate Planner - Fidelity](#)

Our free online service for Fidelity customers guides you through the estate planning process. We can help you get informed, organized, and connected to an attorney so you can secure your wishes: now, and for tomorrow.

IMPORTANT: The projections or other information generated by the Planning & Guidance Center Retirement Analysis and College Analysis and Fidelity Retirement Score regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Your results may vary with each use and over time.



This information is intended to be educational and is not tailored to the investment needs of any specific investor.

Keep in mind that investing involves risk. The value of your investment will fluctuate over time, and you may gain or lose money.

As with all your investments through Fidelity, you must make your own determination whether an investment in any particular security or securities is consistent with your investment objectives, risk tolerance, financial situation and your evaluation of the security. Be sure to review your decisions periodically to make sure they are still consistent with your goals.

As always, you are encouraged to consult with an outside tax advisor regarding your specific situation.

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