



Update your profile—It's worth your time!

Updating your Vanguard Digital Advisor® profile is the first step in getting a saving and investing plan made just for you. It only takes about 5 minutes. Get started today!

1. Ready, set, goals!

Retirement age

Want to retire sooner? Later? Update this number so we can help make sure you have enough saved when you need it.

How long you expect to be retired

Adjust this number if you need to, and we'll create a plan to help you have enough money to live the retirement you choose.

Tax filing status

Update your status so we can give you more accurate tax-planning help for your savings and investments.

2. Let's see how you feel about risk

Risk attitude survey

This quick 3-question survey measures how comfortable you are with financial risk. We'll use your comfort with risk—combined with your profile info—to create your customized retirement plan.

Let's get started!



Scan this code or visit digital-advisor.vanguard.com to update your profile.

3. Refine your retirement goal

Once you've set your retirement goal, you can take your financial planning to the next level. Add info about the topics below, and Digital Advisor will fine-tune your retirement outlook. Plus, by adding any outside accounts and debts, Digital Advisor can help you better manage your money now and in the future.

Household expenses

Add your current monthly expenses so we can calculate how much you need in retirement and how much you should set aside for the unexpected.

Additional household income

Does your household have other sources of income? We'll use this when estimating your savings needs.

Social Security

Answer a few questions and we can help you decide when to start collecting Social Security benefits.

Retirement income

Planning to work in retirement? We can use this when estimating your retirement savings needs.

Retirement spending

Most households will spend almost as much as they did before retirement—between 75% and 80%. We consider this when building your saving and investing strategy.

Investment and savings accounts

If you have other accounts with Vanguard, we can manage them along with your retirement plan account. You can also add outside accounts. We'll use this info to estimate how your money will grow over time.

Debts

Knowing about your debts helps us understand your whole financial picture. We can also use this info to help you pay off your debts faster and with less interest.

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Whenever you invest, there's a chance you could lose the money.

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