



# Q2 2024 Retirement Analysis

## Average Retirement Account Balances

	Q2 2024	Q1 2024	Q2 2023	Q2 2019	Q2 2014
<b>IRA<sup>1</sup></b>	\$129,200	+1%	+14%	+17%	+40%
<b>401(k)<sup>2</sup></b>	\$127,100	+1%	+13%	+20%	+39%
<b>403(b)<sup>3</sup></b>	\$114,700	+2%	+12%	+29%	+57%

<sup>1</sup> Fidelity business analysis of 15.8 million IRA accounts as of June 30, 2024. Considers only active participants with balance.

<sup>2</sup> Fidelity Investments Q2 2024 401(k) data based on 26,000 corporate defined contribution plans and 24 million accounts as of June 30, 2024. These figures include the advisor-sold market but exclude the tax-exempt market. Excluded from the behavioral statistics are non-qualified defined contribution plans and plans for Fidelity's own employees.

<sup>3</sup> Fidelity Investments Q2 2024 403(b) data based on 10,010 Tax-exempt plans and 8.6 million plan participants as of June 30, 2024. Considers average balance across all active plans for 6.37 million unique individuals employed in tax-exempt market

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

Fidelity Distributors Company LLC, 900 Salem Street, Smithfield, RI 02917

National Financial Services LLC, Member NYSE, SIPC, 245 Summer Street, Boston, MA 02110

1157234.1.0