



Financial Consultants available by phone or virtual meetings

To protect the health and safety of employees and participants, TIAA will hold appointments by phone or online (video conference).

Advice and education tailored to your needs

Making decisions about your money can feel complicated. TIAA's experienced financial consultants are here to help you plan for your future. One-on-one personal advice and education* about your retirement plan assets is available at no additional cost. During our discussion, we'll cover questions like:

- 1 Am I saving enough?
- 2 Am I invested appropriately?
- 3 Am I on track to meet my retirement goals?

Knowledge is power

From your first job through retirement and everywhere in between, we can explain your options to help you get the most from your retirement plan. Financial consultants take the time to ask questions and can help you:

- Understand your financial needs
- Evaluate your financial goals and objectives
- By sharing information on managing income and expenses
- Review outside assets and Social Security projections
- Track your progress and adjust your plan if your needs change

Please have your investment, retirement plan, bank, savings and other financial statements available to help your TIAA financial consultant identify areas where we can assist you.

Schedule time today

To connect with a TIAA financial consultant, sign up online at [TIAA.org/schedulenow](https://www.tiaa.org/schedulenow) or call **800-732-8353**, weekdays, 8 a.m. to 8 p.m. (ET). Once an appointment is scheduled we will confirm if you would prefer to meet by phone or online (i.e., video conference).

* Using an advice methodology from Morningstar Investment Management, LLC.

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