



Yale retirement savings program

Virtual financial counseling session

November 2020

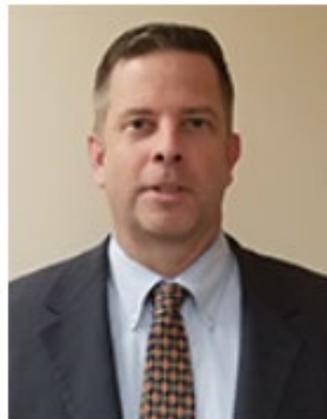


A TIAA financial consultant is prepared to address the following during your meeting:

1. Taking the time to understand your personal financial needs
2. Evaluating your goals and objectives (including risk tolerance, time horizon and other planning needs)
3. Helping you to plan for retirement and other financial goals by providing information on managing income and expenses



Leslie Busch
Financial Consultant



Ronan Duggan
Financial Consultant



Ethel Pippin
Financial Consultant

Create a plan so you can take action



As part of the Yale retirement savings program, you can work with a TIAA Financial Consultant at no additional cost. Due to the coronavirus pandemic, appointments are held over the phone or via video conference.

To meet with your local TIAA Financial Consultant call **800-732-8353** or sign up online at **TIAA.org/schedulenow**.

Consultations & seminars

To protect the health and safety of you and our employees during the coronavirus health crisis, consultations and seminars will be by phone and online.

If you would like to schedule an appointment with a financial consultant, please call us at [800-732-8353](tel:800-732-8353), weekdays, 8 a.m. - 8 p.m. (ET).

Discuss your financial situation with a TIAA consultant

At this time, all consultations and seminars will be by phone and online.

YOUR EMPLOYER	YOUR LOCAL OFFICE	VIRTUAL CONSULTATION
Schedule a consultation with your employer's dedicated TIAA consultant.	Schedule a meeting with a consultant from your local TIAA office.	Schedule a video consultation with a local TIAA consultant.
SCHEDULE	SCHEDULE	SCHEDULE

Get help with your plan and schedule a personal consultation



During your meeting, you can answers for key questions like:

- Are my beneficiaries up to date?
- How should I personalize my Target-Date Plus strategy?
- Am I contributing the right amount?
- Am I on track for retirement?



You can sign up at a
TIAA online workshop



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800-732-8353,
weekdays, 8 a.m.
to 8 p.m. (ET)



[TIAA.org/schedulenow](https://www.tiaa.org/schedulenow)

Your spouse or partner is welcome to join the meeting. **Schedule your meeting today.**



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You should consider the investment objectives, risks, charges, and expenses carefully before investing. Go to [TIAA.org/Yale](https://www.tiaa.org/Yale) for current product and fund prospectuses that contain this and other information. Please read the prospectuses carefully before investing.

Investment products may be subject to market and other risk factors. See the applicable product literature or visit **[TIAA.org/Yale](https://www.tiaa.org/Yale)**.

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