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
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.
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

You can call TIAA at 800-732-8353, weekdays, 8 a.m. to 8 p.m. (ET)

TIAA.org/schedulenow

Your spouse or partner is welcome to join the meeting. Schedule your meeting today.
Investment, insurance, and annuity products are not FDIC insured, are not bank guaranteed, are not bank deposits, are not insured by any federal government agency, are not a condition to any banking service or activity, and may lose value.

*You should consider the investment objectives, risks, charges, and expenses carefully before investing. Go to 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.

This material is for informational or educational purposes only and does not constitute investment advice under ERISA. This material does not take into account any specific objectives or circumstances of any particular investor, or suggest any specific course of action. Investment decisions should be made based on the investor’s own objectives and circumstances.

The TIAA group of companies does not provide legal or tax advice. Please consult with your legal or tax advisor.

Diversification is a technique to help reduce risk. However, there is no guarantee that diversification will protect against a loss of income.

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