Top 10 reasons to meet with a TIAA financial consultant

Consultants can help you create a plan for saving and investing in order to generate income when you retire

All it takes is one hour to know: 1. Are you saving enough?; 2. Are your assets invested appropriately?; and 3. Are you on track to retire when and how you want? Here are 10 more reasons to consider meeting with a TIAA financial consultant.

1. Boost your confidence
Whether you’re just starting to save or nearing retirement, knowing where you stand can help boost your confidence in meeting your goals.

2. It’s only one hour
Investing 60 minutes to plan for the rest of your life is a smart use of time.

3. Consultants are there to help
If you think you haven’t saved enough or aren’t sure where to begin, that’s all the more reason to meet with someone whose sole job is to help you!

4. Your account balance doesn’t matter
Any employee or active participant is welcome to work with a TIAA financial consultant and receive one-on-one retirement plan advice based on the plan’s investment options and related services.

5. Advice is objective
Using an advice methodology based on models by Morningstar Investment Management LLC, an independent third-party, TIAA consultants can tell you which retirement plan investment options to select based on your goals, risk tolerance, current savings and other factors.

Schedule an appointment today!
Visit TIAA.org/schedulenow
6. **Consultants are local**
All of the TIAA financial consultants who serve Michigan employers live in the state.

7. **Include outside assets**
You can include your spouse’s savings for a more comprehensive review or even bring your spouse/partner with you to the meeting. TIAA consultants can also incorporate additional assets outside of the retirement plan in their review.

8. **Retirement plan focus**
TIAA consultants are familiar with the ins and outs of each Michigan institution’s retirement program as well as Social Security, retiree healthcare and other retirement-related issues.

9. **Meet virtually**
TIAA consultants are available to meet by phone or through Zoom. To check availability, visit TIAA.org/schedulenow.

10. **No additional cost to you**
This service is included as a benefit of the retirement plan offered by your employer’s retirement program. You pay no additional cost to meet with a TIAA financial consultant.

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