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MAKING THE MOST OF YOUR MEETING WITH TIAA

Meeting with the TIAA financial advisor is a great step toward a more secure financial future. Whether you're just starting out or already have a plan, we are here to help you make more informed decisions.

In order to make the most of your meeting, it's helpful if you and your spouse or partner bring the following documents to the meeting. These items aren't required in order to have a meeting but they're helpful in making a plan that's right for you. Any statements for accounts outside of TIAA: these may include investments, savings, banking, and other retirement plans, your social security estimate if you have one, and your estimated living expenses now and after retirement or a recent pay stub. Remember to bring a photo id with you, too.

We also encourage you to bring any questions you might have; your financial advisor will be happy to help answer them. Your advisor will work to understand your needs and goals and provide you with the expertise required to address your short- and long-term financial goals. Topics of discussion may include your target retirement age and your risk tolerance.

At TIAA, our goal is to help you make informed decisions. Whether you just need the basics or are a seasoned investor, we want to be a partner in your success. Thank you for taking time to get prepared. We look forward to helping you pursue your goals.