



Financial Coach



UNIVERSITY of  
WASHINGTON

# Take control of your retirement with TIAA

Invest for your future—with dedicated advice and education from day one.

**Congratulations on your new job!** You're on your way to great new things here, and TIAA wants to be with you every step of the way as your retirement plan provider. TIAA was founded on serving those who devote their lives to the fields of education, healthcare and nonprofits.

Your UW retirement plans can help you set aside a portion of your income for your future. Saving now may help you take advantage of potential growth over time. Contributions made to your plan can be taken directly out of your paycheck.

## What makes TIAA a great choice?

- A history of understanding and serving those who work for educational institutions
- We offer you a TIAA Financial Coach as soon as you sign up—at no additional cost

With TIAA, you won't need to explain your situation to a new consultant over the phone every time you call. Your complimentary TIAA Financial Coach will provide you with a consistent, personalized experience every time you need retirement advice and education.



## 5 ways a dedicated TIAA Financial Coach can help you

### 1 Boost your budget.

Your Coach can help you understand your current income and expenses to make sure you feel confident in your financial present.

### 2 Define your goals.

Your financial decisions should be based on your goals. If you haven't defined those yet, your Coach can help, and then work with you to develop an action plan to pursue all of them.

# What does advice and education really mean?

At TIAA, it means that we focus on your goals—all of them.

When it comes to advice and education, everyone has some. How do you make sense of it all? Start with what matters.

**We believe in goals-based planning.** That's why our relationship with you is built around understanding your life goals. While you may become a TIAA customer by opening a workplace retirement plan, we know that your goals are broader than just retirement. They might include travel, saving for college and giving back.

Your experienced TIAA Financial Coach can help you plan ahead, with personalized advice and education for every stage of your life. They have a fiduciary duty to act in your best interest, so the advice and education or recommendation you receive is always customized for you.

## Your TIAA Financial Coach is a one-stop shop to help you:

- Create a plan for pursuing your goals
- Put your plan into motion
- Check your progress regularly

### Have questions?

See next page for how to contact your TIAA Financial Coach.

#### 3 Optimize your retirement plan.

Your retirement should be everything you dream it will be. Your Coach will take into account your risk preferences and goals to help you choose investments and set your contribution rate.

#### 4 Get a clearer overall picture.

If you have accounts with other financial firms, your Coach can review them in combination with your TIAA accounts to make sure everything is working together to help you.

#### 5 Think about new approaches.

If your life has changed or you just feel like it's time to expand beyond what you're currently doing with your money, your Coach can help you consider investment accounts or 529 college savings.

To be introduced to your TIAA Financial Coach,  
please call **206-529-2600** or  
email **[UWFinancialCoach@tiaa.org](mailto:UWFinancialCoach@tiaa.org)**.



Advice is obtained using an advice methodology from Morningstar Investment Management, LLC.

TIAA is a full-service financial services firm specializing in retirement planning. For more than 100 years, we've helped educators and employees of nonprofits pursue their goals through innovative plan designs and customized advice and education or service.

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