



Greetings TIAA ORP members,

Please note, TIAA has various webinar topics for May and an overall savings message.

Each webinar flyers registration link is listed below and will be available “on demand” for 90 days.

May live webinars topics:

- **Halfway There: A retirement checkpoint - May 11 at 12 p.m. (ET)**
 - You can give yourself a mid-career financial checkup to evaluate your current savings, formulate a plan to help pursue your savings goals and manage competing financial priorities. Registration link:
<https://event.on24.com/wcc/r/3036869/A884F63C2E30B1FDF84A1C1A53828D89>
- **Paycheck for life - May 11 at 3 p.m. (ET)**
 - You’ve worked hard to save for retirement. TIAA can help you understand how to create a plan that protects you against key retirement risks as well as helps build a diversified retirement income plan. Registration link:
<https://event.on24.com/wcc/r/3037451/54FD691BECCCD5DC7AA75AB51F3A52FA>
- **Responsible Investing: Portfolios with purpose - May 12 at 12 p.m. (ET)**
 - Make an impact with a social choice. Did you know that responsible investing enables investors to align their social and environmental principals with their financial goals? Learn the factors that make an investment socially responsible, the history of RI and ways for individuals to incorporate RI into their investment strategy. Registration link:
<https://event.on24.com/wcc/r/3037477/B668F2E3F758E77276A03034D94BE85E>
- **Money at Work 2: Sharpening investment skills - May 12 at 3 p.m. (ET)**
 - Feel more secure in your savings strategy by verifying you’re on the right track. And if you’re off track, know what adjustments you need to make. Learn how to

plan your investments and hold on to as much of your nest egg as possible.

Registration link:

<https://event.on24.com/wcc/r/3037505/43AFA4AE5BBEEA44E173521ED526A15D>

- **The 411 on 529 college savings plans - May 13 at 12 p.m. (ET)**

- You can learn how 529 college savings plans work and how to invest in one for a child, grandchild, yourself or other loved one. Registration link:

<https://event.on24.com/wcc/r/3037611/67800ADF3E66645CBACC011DBBCA6D42>

- **Health savings accounts as a nest egg - May 13 at 3 p.m. (ET)**

- You may know about the tax advantages of contributing to a Health Savings Account (HSA), but did you know that HSAs are also a way to save for healthcare expenses in retirement? During this discussion, we'll go through how HSAs can help you in your journey toward financial wellness. Registration link:

<https://event.on24.com/wcc/r/3037653/DB4EBE386949E8BD6E9AE786DCD19B96>

Please contact Jacobi Swafford at jecobi-swafford@utc.edu or (423) 425-4452 with any other retirement or benefit-related questions you might have.

Thank you and have a great day!

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Register now for TIAA's live webinars

Keep your financial goals on track with TIAA's live webinars. Reserve your spot today.

Register now

Visit **TIAA.org/webinars** to register or watch past presentations on demand.

Halfway There: A retirement checkpoint

You can give yourself a mid-career financial checkup to evaluate your current savings, formulate a plan to help pursue your savings goals and manage competing financial priorities.

May 11 at 12 p.m. (ET)

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May 12 at 12 p.m. (ET)

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A TIAA lifetime income webinar

Looking to turn your retirement savings into a “paycheck” for life?

You diversify your investment portfolio before retirement to help offset risk. A similar strategy can help see you through retirement.

Learn how creating a diversified *income* plan—one that uses a combination of income sources and includes annuity income that’s guaranteed for life¹—can help reduce the risks you may face in retirement and ensure you have income that never runs out.

Register today for our Tuesday, May 11 live webinar, 3 p.m. to 4 p.m. (ET)

Miguel Shefferson is a Senior Director with TIAA’s Institutional Financial Solutions and is passionate about educating clients on TIAA products that promote financial well-being, with a specific focus on retirement readiness.

He brings over 20 years of industry experience, including prior roles with TIAA’s Nuveen Global Asset Management group and Individual Advisory Services business, where he partners daily with TIAA’s Individual Advisory and Institutional Financial Services teams, promoting awareness about TIAA’s unique capabilities.

Based out of TIAA’s Charlotte, North Carolina office, Miguel is a graduate of North Carolina A&T State University, where he obtained his B.S. in Accounting, and a graduate of the McColl School of Business at Queens University Financial Planner Certification Program. He is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional.*

Sign up today!

- ☒ It’s quick.
- ☒ It’s easy.
- ☒ It matters.

[Schedule online](#)

And it’s at *no additional cost to you!*



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¹ Guaranteed income is provided by TIAA Traditional Annuity, issued by Teachers Insurance and Annuity Association of America. All guarantees are backed by its claims-paying ability. TIAA Traditional Annuity is a guaranteed insurance contract and not an investment for federal securities law purposes. Paycheck is the annuity income received in retirement. Guarantees of fixed monthly payments are only associated with TIAA's fixed annuities.

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A TIAA Financial Essentials webinar

Responsible Investing: Portfolios with purpose

Make an impact with a social choice. Did you know that responsible investing (RI) enables investors to align their social and environmental principals with their financial goals? Learn the factors that make an investment socially responsible, the history of RI and ways for individuals to incorporate RI into their investment strategy.

Register today for this live webinar on Wednesday, May 12, from 12 p.m. to 1 p.m. (ET)

Want help?

- ☒ **It's quick.**
- ☒ **It's easy.**
- ☒ **It matters.**

Schedule online

Or visit **[TIAA.org/webinars](https://www.tiaa.org/webinars)** to register. And it's at *no additional cost to you!*



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