TIAA

Register now for TIAA's April live webinars

April is National Financial Literacy Month and you can get ready with TIAA's live webinars. Reserve your spot today.

Schedule online

TIAA.org/webinars

Special Topic: Tax planning in 2019

It is that time of year, when taxes are on our minds. Many of us will have just filed our income tax return and will want to think about income tax planning strategies for 2019. We also want to know if estate, gift or generation skipping transfer (GST) taxes will impact our planning. Join us to learn some common strategies to help leave more for you and for your heirs.

April 16 at 12 p.m. (ET)

Tomorrow in Focus: Saving for your ideal retirement

Find out how retirement savings, planning and the real benefit of time are essential features of retirement investments.

April 16 at 3 p.m. (ET)

Special Topic: Quarterly economic and market update

TIAA's Chief Investment Strategist will discuss economic and market developments that may impact your retirement savings strategy.

April 17 at 12 p.m. (ET)

The Starting Line: Beginning to save for retirement

You can learn how to evaluate and manage debt, find additional ways to save, create a budget and begin to plan for retirement.

April 17 at 3 p.m. (ET)

Within Reach: Transitioning from career to retirement

You can plan ahead to help make the most out of your retirement—from paying yourself to allowing for taxes, healthcare and estate planning wishes.

April 18 at 12 p.m. (ET)

Coninue to next page

Special Topic: All about IRAs

You can learn the facts on IRAs, how an IRA may help you meet your retirement savings goals and which one may be right for you.

April 18 at 3 p.m. (ET)

Special Topic: Millennial financial literacy and fin-tech use

If you have ever felt a little lost when it comes to your finances, you are not alone. In a recent study, a financial literacy gap was found to exist amongst millennials. Researchers from TIAA Institute discuss this study and how it may shape the future of finance and technology.

April 25 at 12 p.m. (ET)

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A TIAA Financial Essentials webinar

Millennial financial literacy and fintech use

If you have ever felt a little lost when it comes to your finances, you are not alone.

Based on a recent report released by the TIAA Institute and the Global Financial Literacy Excellence Center (GFLEC) at the George Washington University School of Business, a financial literacy gap was found to exist amongst millennials.

Join researchers from the institute to hear more about this impactful study and how it may shape the future of finance and technology—some of what you learn, may surprise you.

Register today for this live webinar on Thursday, April 25, from 12 p.m. to 1 p.m. (ET).

Featured Speaker: Paul Yakoboski, Ph.D.
Senior Economist, TIAA Institute

As a senior economist with the TIAA Institute, Paul is responsible for research on lifetime financial security, including topics related to Defined Contribution plan design, financial literacy and capability, individual saving and investment decision making, and asset management during retirement, as well as research on workforce issues in the higher education and nonprofit sectors.

Yakoboski is a member of the American Economic Association and the National Academy of Social Insurance. He serves on the board of the Journal of Retirement, the editorial advisory board of Benefits Quarterly, the research committee of the Insured Retirement Institute and the Society of Actuaries' Committee on Post-Retirement Needs and Risks.

Yakoboski earned his Ph.D. and M.A. in economics from the University of Rochester and his B.S. in economics from Virginia Tech.

Want help?

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

Schedule online

Or visit TIAA.org/webinars to register. And it's at no additional cost to you!

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You can attend live webinars to help boost your financial know-how

Miss a seminar?

You can register for upcoming titles at TIAA.org/webinars.

All live webinar times are (ET).

- Spending
- Saving
- Planning
- Investing
- Living

April

- **SPECIAL TOPIC:** Tax planning in 2019 **4/16, 12-1 p.m.**
- **Tomorrow in Focus:** Saving for your ideal retirement **4/16, 3-4 p.m.**
- **SPECIAL TOPIC:** Quarterly economic and market update **4/17, 12-1 p.m.**
- **The Starting Line:** Why and how retirement saving should begin now **4/17, 3-4 p.m.**
- **Within Reach:** Transitioning from career to retirement **4/18, 12-1 p.m.**
- **SPECIAL TOPIC:** All about IRAs **4/18, 3-4 p.m.**
- **SPECIAL TOPIC:** Millennial financial literacy and fin-tech use **4/25, 12-1 p.m.**

May

- **SPECIAL TOPIC:** The 411 on 529 college savings plans **5/2, 12-1 p.m.**
- **Attention to Detail:** Financial finishing touches for women **5/7, 3-4 p.m.**
- **SPECIAL TOPIC:** Market-proof your retirement **5/8, 12-1 p.m.**
- **Healthy Numbers:** Integrating healthcare into your retirement plan **5/8, 3-4 p.m.**
- **Halfway There:** A retirement checkpoint **5/9, 3-4 p.m.**
- **SPECIAL TOPIC:** Understanding Medicare **5/14, 12-1 p.m.**
- **Money at Work 2:** Sharpening investment skills **5/14, 3-4 p.m.**
- **She's Got It:** A woman's guide to saving and investing **5/15, 12-1 p.m.**
- **SPECIAL TOPIC:** Demystifying life insurance **5/16, 12-1 p.m.**
- **SPECIAL TOPIC:** Estate planning basics **5/21, 12-1 p.m.**

June

- **Equally Prepared:** Financial planning for the LGBT community **6/11, 12-1 p.m.**
- **SPECIAL TOPIC:** Market-proof your retirement **6/11, 3-4 p.m.**
- **Paying Yourself:** Income options in retirement **6/12, 12-1 p.m.**
- **Start to Finish:** The early career woman's guide to financial wisdom **6/12, 3-4 p.m.**
- **SPECIAL TOPIC:** How smart investors ride out market volatility **6/13, 12-1 p.m.**
- **Inside Money:** Managing income and debt **6/13, 3-4 p.m.**

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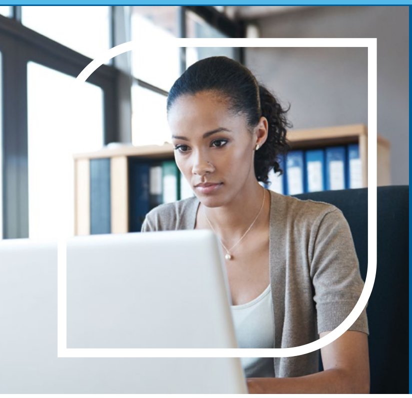

A TIAA Financial Essentials webinar

Tax planning in 2019

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Featured speakers:

James M. Alverson, CFP®
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

Daniel C. Bollini
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

As Directors of Wealth Planning Strategies for TIAA, both James and Daniel provide comprehensive wealth transfer, estate and tax planning considerations for clients with the most complex needs. Their tax and estate planning knowledge and backgrounds allow them to provide high-net-worth families with specialized advice and sophisticated planning strategies for every aspect of their financial lives.

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