Planning for Retirement: The why, what and how

Join us for a discussion of the challenges and risks people face in retirement, and how good planning can address them. During this workshop we will discuss:

- Financial risks during working years and in retirement
- What is an annuity anyway? Why might I want one?
- A deep dive into TIAA Traditional* (offered by Teachers Insurance and Annuity Association of America)—in accumulation and in retirement
- Taking full advantage of the options in your retirement plan

Register today for this special presentation:
Tuesday, October 15, 2019
12:30 p.m. to 1:30 p.m.
Murray Room in Yawkey Center
140 Commonwealth Avenue
Chestnut Hill, MA 02467

Lunch will be provided.
Please arrive a few minutes early to get your lunch and a seat!

Featured speaker:

Matthew DiCroce
Director, Institutional Investment Strategist

Matthew joined TIAA in 2015 as Director, Institutional Investment Strategist. He brings more than 10 years of investment experience in asset management, trading, hedge funds and consulting.

Prior to TIAA, Matthew worked as a consultant for a Boston based multifamily office where he sourced and evaluated both public and private investment opportunities. He has held positions at two New York City hedge funds, as a trader and analyst.

He earned a B.S. from Villanova University with a double major in Finance and Management Information Systems. He holds FINRA Series 6 and 63 registrations.
* When using TIAA Traditional outside of a qualified plan, you should max out contributions to qualified plans first (403b, 401k, IRA).

This material is for informational or educational purposes only and does not constitute investment advice under ERISA. This material does not take into account any specific objectives or circumstances of any particular investor, or suggest any specific course of action. Investment decisions should be made based on the investor’s own objectives and circumstances.

This webinar is being provided for informational and educational purposes only and should not be construed as specific advice.

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Annuity contracts contain exclusions, limitations, reductions of benefits and may contain terms for keeping them in force. Your financial consultant can provide you with costs and complete details.

TIAA Traditional is a fixed annuity product issued through these contracts by Teachers Insurance and Annuity Association of America (TIAA), 730 Third Avenue, New York, NY 10017: Form series 1000.24; G-1000.4 or G-1000.5/G1000.6 or G1000.7; 1200.8; G1250.1; IGRS-01-84-ACC and IGRS-02-ACC; IGRS-CERT2-84-ACC and IGRS-CERT3-ACC; IGRS-01-84-ACC and IGRS-02-ACC; IGRS-CERT2-84-ACC and IGRS-CERT3-ACC; 6008.8 and 6008.9-ACC; 1000.24-ATRA; 1280.2, 1280.4, or 1280.3 or 1280.5, or G1350. Not all contracts are available in all states or currently issued.

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