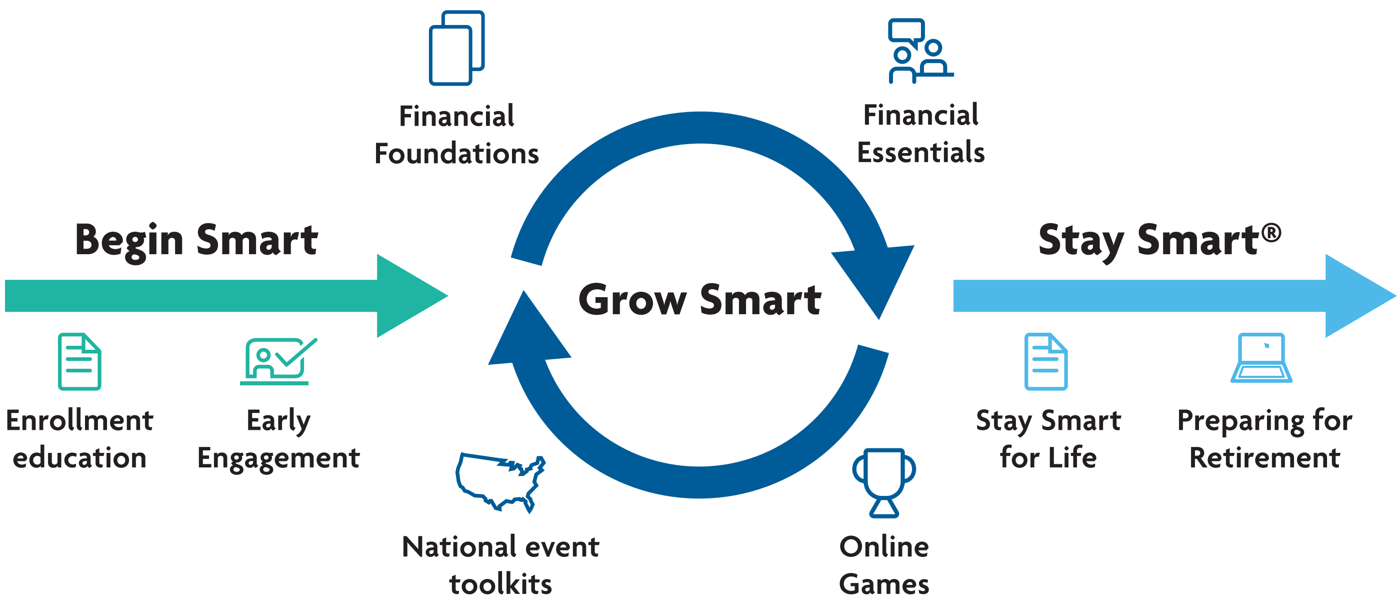
Communication, Education and Advice

TIAA's Communication, Education and Advice (CE&A) programs help you meet your fiduciary responsibilities and educate employees as they pursue financial well-being for life. No matter their age, life stage or financial needs, your employees will receive the right message at the right time in the right way to help them succeed financially now and in the future.



Featured support

Retirement Advisor

Online advice

Ready-to-use library

Educational materials for employees

Webinars

Education on financial wellness topics

Begin Smart

Onboarding into the plan

Enrollment education

Enrollment materials with basic planning education that drives employees online for more information.

Early Engagement

An onboarding program with multiple follow-ups that encourages online account setup, eDelivery and naming beneficiaries. Offers planning tips and advice for financial wellness.

Grow Smart

Financial education year by year

Financial Foundations

Five annual targeted educational campaigns, customized by life stage and other variables that promote financial wellness. Topics: annual checklist, diversification, estate planning, income in retirement and saving more.

Financial Essentials

Live webinars and on-demand recordings covering a range of financial wellness topics to address individual employee needs. Topics: spending, saving, planning, investing, living in retirement and more.

National event toolkits

Toolkits promoting financial wellness during National Financial Literacy Month and National Retirement Security Week. Toolkits may include emails, flyers, social media posts, articles or other materials.

Online Games

Interactive games and quizzes supporting financial literacy, digital engagement and overall financial well-being.

Stay Smart

Preparation for retirement or the transition after leaving a job

Stay Smart for Life

Support for employees ages 60 to 70 to help them prepare for the transition to retirement. Also includes support for job changers on what to do after leaving their employer.

Preparing for Retirement Center

Online center with insights and resources to help preretirees plan and make informed financial decisions.

Ongoing Support

Advice and digital tools

Advice

Retirement Advisor is an online advice tool that provides personalized savings and investment recommendations. Whether an employee has $5 or $5 million, one-to-one advice is also available, tailored to individual financial needs and aimed at building a financial plan and checking progress toward goals.

Retirement Income Planner

Online tool to help employees explore income options and pursue retirement income goals.

360° Financial View

Online tool showing an employee's complete financial picture in one place. Can show accounts from over 11,000 institutions, track spending and help create budgets.

TIAA Mobile

Mobile app allowing employees to manage their account, bank online and more.

Digital tools and calculators

Additional tools to help with retirement, taxes, saving and investing, budgeting and more.

Ready-to-use library

Self-serve, off-the-shelf collateral to further promote financial well-being. Available on PlanFocus®.

Communications calendar

Topics to address overall financial well-being throughout the year

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Financial Foundations												
New Year's checklist	✓											
Diversification			✓									
Estate planning					✓							
Income in retirement								✓				
Savings, Income & Peer									✓			
Webinars												
Webinar emails		✓		✓			✓			✓		✓
Online games												
Financial IQ Challenge										✓		

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