Financial knowledge for all

Are you within 5 years of your retirement date?

Here are the events that are coming soon to Wellesley College to help you reach your goals.

Estate Planning
Presented by TIAA

For many, providing a legacy for our loved ones is a primary goal, but in order to leave a legacy, you have to first build that legacy. Join us as we discuss how you can strategically generate income to meet your lifetime needs, structure a legacy that is efficient from both an income and an estate tax perspective, and review the documents that you need to make sure that your wishes about your legacy are upheld.

Friday, March 8 from 12:30 p.m. to 1:30 p.m. in the Library Lecture Room Register

Retiree Medical Coverage Options
Presented by Harvard Pilgrim Health Care

Learn About Medicare and the Options Available to Supplement Medicare. This seminar will review the benefits that Medicare and retiree healthcare plans can provide. Eligibility rules and choices will be covered so you have the knowledge you need to make informed decisions before retirement.

Wednesday, April 3 from 12:30 p.m. to 1:30 p.m. in LWC, Room 413 Register

Paying Yourself: Income Options in Retirement
Presented by TIAA

Learn the basic rules that govern the most common retirement accounts, gain perspective on when to tap into different assets, and discover the flexible income choices available.

Monday, April 22 from 12:30 p.m. to 1:30 p.m. in the Library Lecture Room Register

Social Security: Hear from the Experienced Professional and Leverage the Most from your Benefit.
Presented by Francine Kollias.

Francine specializes in explaining how to navigate the Social Security process. She'll talk about retiree, survivor and disability benefits available and she'll review filing options and planning strategies.

Tuesday, April 23 from 12:30 p.m. to 1:30 p.m. in the Library Lecture Room Register

Register today!

TIAA

WELLESLEY

This material is for informational or educational purposes only and does not constitute a recommendation or investment advice in connection with a distribution, transfer or rollover, a purchase or sale of securities or other investment property, or the management of securities or other investments, including the development of an investment strategy or retention of an investment manager or advisor. 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 in consultation with an investor's personal advisor based on the investor's own objectives and circumstances.

The TIAA group of companies does not give tax or legal advice. The workshop provides general information that you should discuss with your personal tax and legal advisors to determine how it may apply to your individual circumstances.

There are inherent risks in investing in securities. Investment products may be subject to market and other risk factors. See the applicable product literature, or visit **TIAA.org** for details. It is possible to lose money by investing in securities.

Investment, insurance, and annuity products are not FDIC insured, are not bank guaranteed, are not deposits, are not insured by any federal government agency, are not a condition to any banking service or activity, and may lose value.

You should consider the investment objectives, risks, charges, and expenses carefully before investing. Please call 877-518-9161 or go to TIAA.org for underlying product and fund prospectuses that contain this and other information. Please read the prospectuses carefully before investing.

TIAA-CREF Individual & Institutional Services, LLC, Teachers Personal Investors Services, Inc., and Nuveen Securities, LLC, Members FINRA and SIPC, distribute securities products. Annuity contracts and certificates are issued by Teachers Insurance and Annuity Association of America (TIAA) and College Retirement Equities Fund (CREF), New York, NY. Each of the foregoing is solely responsible for its own financial condition and contractual obligations.

BUILT TO PERFORM.

CREATED TO SERVE.

744071
141031427

(02/19)