Money at Work 1: Foundations of investing

It doesn’t matter how old you are, where you are in your career or how much you earn. Pursuing retirement goals requires the same things: spend less, save more. It’s really that simple.

TIAA’s workshop leader will give you information to help you determine which investment vehicles may be right for you:

- Discover what stocks, annuities, mutual funds and IRAs are so you can determine which ones best fit your needs
- Learn about risk and finding your risk tolerance
- See how the same savings principles can work for short- or long-term goals

Feel free to invite your spouse or partner to register and attend this workshop with you.

Join us on Thursday, April 4, 2019 from 12:00 p.m. to 1:00 p.m.
Office of Worklife, 245 Mercer Street

Your facilitator:

James Howard
Senior Financial Consultant, Institutional Retirement

James began his financial services career in 1988 and has been with TIAA since 2000. He serves our institutional clients in the state of New York from the local New York City TIAA office. He serves the following institutions: New York University, Columbia University, Fordham University, St. John’s University, and Weill Cornell Medical College.

James holds a Bachelor of Science in Finance from The State University of New York. He holds FINRA Series 6, 7, 63, 66 registrations while maintaining Life, Health and Variable Annuity licenses from the State(s) of New York, New Jersey, Connecticut.
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.

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.

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