

# The Syracuse University retirement plan—made easier with advice and education from TIAA

## Meet your dedicated Syracuse University financial consultant team



**Dan Cuccia**

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To meet with a TIAA financial consultant, call **855-842-CUSE (2873)**, or sign up online at **[TIAA.org/schedulenow](https://TIAA.org/schedulenow)**.

## You can get assistance with the Syracuse University retirement plan

As part of the program, you can work with a member of the TIAA Field Consulting Group. A TIAA financial consultant can help you:

1. Understand the program, including employee voluntary contributions and the University's contribution
2. Review the investment choices available
3. Enroll in the program
4. Learn more about consolidating your retirement assets

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### To learn more about the program

For plan highlights and investment option information, visit **[TIAA.org/syr](https://TIAA.org/syr)**.



**Syracuse University**



### You can participate in live educational webinars

Visit [TIAA.org/webinars](https://www.tiaa.org/webinars) to register for upcoming live webinars. Many financial topics are covered. On-demand videos and educational content are also available.

### Advice and education tailored to your needs

Your consultant will provide one-on-one, personalized advice and education to help you make informed choices. During your meeting, the following questions will be answered:

1. Am I saving enough?
2. Am I invested appropriately?
3. Am I on track to retire at the age I want?

### You can create a plan and take action

Your experienced financial consultant can help you organize your financial world. Your consultant understands everyone has unique needs and is committed to the following:

- Taking the time to understand your personal financial needs
- Evaluating your goals and objectives (including risk tolerance, time horizon and other planning needs)
- Helping you save for many different financial goals by providing information on managing income and expenses
- Getting a holistic view of your retirement readiness by reviewing outside assets and Social Security projections
- Providing actionable recommendations, including investment mixes suitable for your circumstances, and helping to implement your chosen strategy for added confidence
- Being available to help you track your progress and adjust your plan if your needs change



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