

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.

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.



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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



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.

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CREATED TO SERVE.