

Have questions about the upcoming changes to the Wellesley College Retirement Investment Menu?

Learn more with our Retirement Planning Series: Learn, Prepare, Engage



Learn the Basics of Saving and Investing for Retirement

You are welcome to attend one of the workshops, presented by Dave Carboni, Ph.D., CFP. Dr. Carboni is a financial educator. He will review the following aspects of retirement planning:

- How much might you need in retirement?
- Start saving early and prioritize your savings
- Investment terms and options
- Asset allocation—the right mix for you
- Investment choices
- A review of the Wellesley College 403(b) Retirement Plan

Tuesday	10/4	5 p.m. – 6:30 p.m.	College Club
Thursday	10/6	8:30 a.m. – 10 a.m.	Library Lecture Room
Thursday	10/13	Noon – 1:30 p.m.	Library Lecture Room
Monday	10/17	12:30 p.m. – 2 p.m.	Library Lecture Room

Refreshments will be provided.

To learn about the upcoming changes to the Retirement Plan Investment Menu, plan to attend an on-campus event for each of the steps in our Retirement Planning Series:

Learn

Prepare

Engage

Prepare for the New Investment Menu with Financial Education Seminars & Drop-In Information Desks.

Plan to attend one of the **TIAA-CREF** seminars. You can attend a seminar based on your current investments or attend the seminar that best fits your schedule. Your TIAA-CREF Consultants will outline the important changes taking place, the actions you can choose to take and key dates to remember. The following topics will be reviewed:

- Why Changes Are Being Made
- Your New Retirement Plan Investment Menu
- Transitioning To The New Investment Menu
- Get Started Now With Voluntary Contributions
- Making Investment Decisions
- How To Learn More & Receive Assistance

Tuesday, October 18

Drop-In Information Desk: 9 a.m. – 2:30 p.m.

Seminar for TIAA-CREF Participants: 10 a.m. – 11 a.m.

Seminar for Union Employees: Noon – 1 p.m.

Seminar for Fidelity/Calvert Participants: 1:30 p.m. – 2:30 p.m.

Wednesday, October 26

Drop-in Information Desk: 9 a.m. – 4:30 p.m.

Seminar for Union Employees: 10 a.m. – 11 a.m.

Seminar for Fidelity/Calvert Participants: Noon – 1 p.m.

Seminar for TIAA-CREF Participants: 3 p.m. – 4 p.m.

Thursday, November 10

Drop-in Information Desk: 9 a.m. – 4:30 p.m.

Seminar for Fidelity/Calvert Participants: 10 a.m. – 11 a.m.

Seminar for TIAA-CREF Participants: Noon – 1 p.m.

Seminar for Union Employees: 3 p.m. – 4 p.m.

Special Drop-in Information Desk

November 10: Noon – 2 p.m.

At the Leaky Beaker in the Science Center

Location For Seminars & Drop-In Information Desk: Library Lecture Room

Refreshments will be provided.



Engage and commit to your Financial Future by scheduling A One-On-One Investment Counseling Session

Your TIAA-CREF consultant will create a personalized retirement strategy tailored to your unique financial goals, at no charge. If you are not currently participating in the Retirement Plan, you can also receive enrollment assistance.

Get answers to these questions:

- Am I on the right track to reach my retirement goals?
- What asset allocation mix and investment strategy is best for me?
- How can I meet my income needs in retirement?

Counseling Session Dates

October: 25

November: 3, 15, 22, 30

December: 1, 7, 13, 15, 20

Location For Individual Counseling Sessions: HR Office

Schedule Your Session

To schedule your Individual Counseling Session, visit an Information Desk or call TIAA-CREF at 781-314-2403.

What to bring to your TIAA-CREF investment counseling session (if available):

- All investment account statements, including investments outside of the Wellesley College Retirement Plan
- Most recent Social Security statement

TIAA-CREF consultants will need this information to get a complete picture of your current financial situation.

Presentations Available Online:

If you are unable to attend the events in our Retirement Planning Series, you can view the narrated presentation at www.tiaa-cref.org/wellesleycollege. For your convenience, the presentation will be available 24/7, beginning October 3.

Please read the prospectus and consider the investment objectives, risks, charges and expenses carefully before investing.

