

# Essentials by TIAA

Promoting financial well-being and reinforcing retirement plans as a valuable benefit



## Meaningful content delivered in the **right way** at the **right time**.

Motivating employees to take action toward a more secure future through a robust, multichannel approach



Calendar-based outreach



Always-on content



Event-based triggers



To learn more about how Essentials by TIAA can help improve outcomes for your employees, contact your TIAA representative.



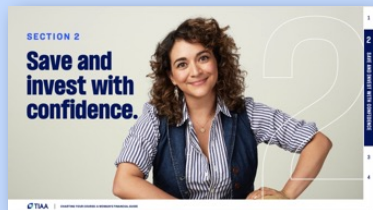
Learn more at [tiaa.org/FinancialEssentials](https://www.tiaa.org/FinancialEssentials).

## PILLAR 1

# Financial Essentials

Foundational financial education

Reinforces healthy behaviors from building savings to optimizing portfolios and getting advice



## PILLAR 2

# Life Essentials

Financial moments that matter in an employee's life, career and retirement



Onboarding

Check-ins

Web content

Pop-up ads

Milestones

Celebrates and supports each individual's retirement plan journey, encouraging ongoing steps to succeed

## PILLAR 3

# Your Plan Essentials

Valuable information on investment solutions and services that are included in the retirement plan

Helps employees...

- Take full advantage of their plan benefits
- Get advice for personalized solutions
- Identify plan solutions that can help



## Reinforcing the value of your plan

The greater the engagement, the greater the benefit to help you:

**Fulfill** your fiduciary responsibilities

**Build** trust

**Increase** plan utilization

**Improve** outcomes

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