

# Financial Essentials Program

Title	Topic	Audience
<b>Enroll</b>		
<b>Getting a head start: A step-by-step overview of your plan</b>	Understanding the retirement plans offered by your employer, the advantages of a retirement program, how to create a retirement strategy and how to update your account with TIAA.	New hires
<b>Start to finish: The early career woman's guide to financial wisdom</b>	Learning how to balance income and expenses, identify key costs and manage spending more effectively; how saving a little now may help your balance add up later; and how to make a plan for your financial future.	Women (early career)
<b>Save</b>		
<b>Take control of your financial life: Steps to managing money and debt</b>	Improving day-to-day financial skills, including learning how to manage money and balance priorities to help enjoy life and save for the future.	All (early career)
<b>Charting your course: A financial guide for women</b>	Developing basic retirement saving skills, how to create a retirement saving plan, evaluating financial health and setting goals, and how to help make your money work harder.	Women
<b>Manage</b>		
<b>Make the move toward long-term financial security: Your midcareer retirement check-in</b>	Knowing the keys to successful money management, how to juggle competing financial demands and retirement saving strategies for lifelong financial security.	All (mid-career)
<b>Attention to detail: Financial finishing touches for women</b>	Staying in control of wealth, financial planning investment and asset allocation strategies, and the right questions to ask a potential financial advisor.	Women
<b>Protect</b>		
<b>Invest for success: 5 principles you need to know</b>	Understanding the key principles of investing for retirement, from compounding to taxes to choosing investments. Includes learning that how you invest for retirement is just as important as how much you save.	All
<b>Fine-tune your retirement strategy: Investing toward a secure future</b>	Moving beyond investing basics to help fine-tune saving and investing strategies for retirement and build a more secure future.	All (mid-to-late career)
<b>Retire</b>		
<b>Write your next chapter: 5 steps to setting your retirement date</b>	Deciding when the time is right to retire, including estimating retirement expenses, closing any income gap and understanding key milestones that can impact retirement finances.	All (late career)
<b>Live with confidence in retirement: 5 steps to creating your retirement income plan</b>	Understanding how to create an income plan that helps maximize savings throughout retirement, including how different sources of income work, how to build your strategy for lifetime income and what to consider when planning withdrawals from retirement assets.	All (late career)

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