Tax planning in 2020

It is that time of year, when taxes are on our minds. Many of us will have just filed our income tax return and will want to think about income tax planning strategies for 2020. We also want to know if estate, gift or generation skipping transfer (GST) taxes will impact our planning. Join us to learn some common strategies to help leave more for you and for your heirs.

April 14 at 12 p.m. (ET)

The starting line: Why and how retirement savings begins now

Learn how to evaluate and manage debt, find additional ways to save, create a budget and begin to plan for retirement.

April 14 at 3 p.m. (ET)

Quarterly Economic and market update

Take a closer look at our views on the financial markets, including key market drivers, U.S. economy, policy and politics, and investing in public markets. This webinar will also cover the challenges that investors face and how to navigate them.

April 15 at 12 p.m. (ET)

Understanding Medicare

Paying for healthcare in retirement is a critical part of financial planning and it is important to understand how Medicare operates and what choices you have. This webinar will help you understand some aspects of Medicare including eligibility and what plans are available to you. We hope that you will join us for this educational event.

April 16 at 12 p.m. (ET)

Looking to turn your retirement savings into a “paycheck” for life

Learn how creating a diversified income plan—one that uses a combination of income sources and includes annuity income that’s guaranteed for life*—can help reduce the risks you may face in retirement and ensure you have income that never runs out.

April 16 at 3 p.m. (ET)
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TIAA group of companies does not give tax or legal advice. These webinars provide general information that you should discuss with your personal tax and legal advisors to determine how it may apply to your individual circumstances.

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