



# A TIAA Financial Essentials webinar

## Beneficiary designation considerations

We spend our lifetimes building wealth, and understanding how it will be distributed to our beneficiaries is important to our legacies and our beneficiaries. The SECURE Act made sweeping changes in many areas of retirement benefits, especially on how your beneficiaries are treated. In this seminar, you will learn more about how the acceleration of income taxation will impact both individual and trust beneficiaries, address a new class of beneficiaries, and discuss exceptions to the new rules. In addition to the rules, we'll also cover planning ideas and strategies to address the tax consequences, including ideas to revise your beneficiary designations, the opportunity to convert accumulated wealth to more tax-friendly legacy assets such as Roth IRAs, and how to implement tax-efficient strategies for those with charitable inclinations.

### Register today for this live webinar on Wednesday, July 13:

- 3 p.m. to 4 p.m. (ET)
- 2 p.m. to 1 p.m. (CT)
- 1 p.m. to 2 p.m. (MT)
- 12 p.m. to 1 p.m. (PT)

### Featured speakers:

**Sarah Price**  
Director, Wealth Planning Strategies  
TIAA

**Teri Malmstrom**  
Director, Wealth Planning Strategies  
TIAA

### Want help?

- It's quick.**
- It's easy.**
- It matters.**

[Register online](#)

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