SB
Science of Benefits

Caltech

Elevate your retirement knowledge

Whether you're newly employed or about to launch into retirement, we've designed a webinar curriculum that can help you plan ahead and make the most of your investments.

COURSES

LEVEL 101

LEVEL 201

LEVEL 301

LEVEL 401

Course Catalog

Start strong with Level 101—a collection of courses that will benefit everyone! Then move on to whichever level or courses will help you most as you journey to a better understanding of your retirement options and improve your overall financial literacy.

LEVEL 101

A universal overview

GET A HEAD START >
A step-by-step plan overview

MEET YOUR FINANCIAL CONSULTANT >
What to expect during a 1:1 meeting

STAY CONNECTED WITH TIAA >
Our online retirement tools

BE AN INFORMED INVESTOR >
How to deal with market volatility

BE AN INFORMED INVESTOR >
How to deal with market volatility

TWO WAYS TO SAVE >
Roth after-tax vs. pretax savings

LEVEL 201

A solid foundation

INVEST FOR SUCCESS >
5 principles you need to know

TAKE CONTROL OF YOUR FINANCIAL LIFE >
5 steps to managing money and debt

OPEN DOORS TO THE FUTURE >
Understanding 529 college saving plans

START TO FINISH >
A woman's guide to saving and investing

LEVEL 301

Managing your plan

MOVE TOWARD LONG-TERM FINANCIAL SECURITY >
Your midcareer retirement check-in

INVEST FOR SUCCESS >
Fine-tuning your retirement strategy

KNOW YOUR OPTIONS >
The impact of taxes now or later

CHART YOUR COURSE >
A financial guide for women

RESPONSIBLE INVESTING >
Seek competitive returns without compromising your values

LEVEL 401

Protecting your assets

LIVE WITH CONFIDENCE IN RETIREMENT >
5 steps to creating your retirement income plan

DIVERSIFY YOUR INCOME >
How income diversification can improve retirement outcomes

PASS ASSETS ON >
Common estate planning considerations

PLAN AHEAD WITH SOCIAL SECURITY >
Basic considerations and strategies

UNDERSTAND THE RETIREMENT MOSAIC >
Everything to consider when planning to retire

LEVEL
101

A universal overview

These webinars will help you better understand your benefits and establish a plan for moving forward. We recommend beginning with “Get a head start” and “Meet your financial consultant” before exploring further on your own. Just click “WATCH NOW.”

Getting a head start

A step-by-step plan overview

Understand 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.

WATCH NOW >

Meet your financial consultant

What to expect during a 1:1 meeting

Tune in to understand more about what happens during a 1:1 session with a TIAA financial consultant.

WATCH NOW >

Stay connected with TIAA

Our online retirement tools

Get the app, go online and stay in touch. TIAA’s online retirement tools make it easier for you to keep track of your finances from anywhere.

WATCH NOW >

Be an informed investor

How to deal with market volatility

Get help navigating the ups and downs of the market. We’ll help you make sense of market turbulence and discuss the forces driving volatility, strategies to mitigate market swings in a portfolio and what this may mean for your financial plan.

WATCH NOW >

Get a paycheck for life

Paying yourself in retirement

Turn your retirement savings into a paycheck for life. Explore how to identify retirement risks and challenges, prepare for distribution with income needs and sources and ultimately how to build a plan.

WATCH NOW >

Two ways to save

Roth after-tax versus pretax savings

Discover the ways you can save in your Caltech retirement plan.

WATCH NOW >

LEVEL 201

A solid foundation

These webinars will help you establish a retirement income saving and planning strategy for whatever you hope to achieve during retirement. Just click “WATCH NOW.”

Invest for success

5 principles you need to know

No matter where you are in your career journey, this webinar can help you understand the key principles of investing for retirement. From compounding to taxes to choosing investments, you’ll learn that how you invest for retirement is just as important as how much you save.

WATCH NOW >

Take control of your financial life

5 steps to managing money and debt

If you’re just starting out or want to improve your day-to-day financial skills, this webinar will help you learn how to manage your money and balance your priorities so you can enjoy life now and save for the future.

WATCH NOW >

Open doors to the future

Understanding 529 college savings plans

Learn how 529 college savings plans work and how to invest in one for a child, grandchild, yourself or another loved one.

WATCH NOW >

Start to finish

A woman’s guide to saving and investing

Developed with women in mind but open to anyone interested in making a comprehensive plan, this webinar covers core concepts of investment strategies, taking on life’s challenges, a financial personality type quiz and goal setting.

WATCH NOW >

LEVEL 301

Managing your plan

These webinars will help you manage your investments and consider longer-term goals. Just click “WATCH NOW.”

Move toward long-term financial security

Your midcareer retirement check-in

Review your retirement plan to make sure you’re on the path to lifelong financial security! This webinar includes considering your priorities, putting together a spending plan and knowing the ways to save, all while juggling current financial demands.

WATCH NOW >

Invest for success

Fine-tuning your retirement strategy

If you’re in or near your peak earning years, move beyond the basics to build a secure retirement. This includes adopting a saving lifestyle, avoiding pitfalls that can sabotage your saving and planning carefully before retiring.

COMING SOON

Know your options

The impact of taxes now and later

See why location matters! Your assets can be taxed now or later, but coming up with the right strategy is personal. We’ll discuss which options might be best for you and your portfolio.

WATCH NOW

Charting your course

A financial guide for women

When it comes to financial security, it’s essential to have a plan that aligns with your long-term goals. This webinar is designed to help you evaluate where you are on your financial journey, figure out where you want to be and consider strategies for getting there.

WATCH NOW >

Responsible investing

Seek competitive returns without compromising your values

Learn about environmental, social and governance (ESG) engagement, integration and impact and how it influences our approach to responsible investing.

WATCH NOW

LEVEL
401

Protecting your assets

These webinars will help you protect the investments you've made and be aware of important steps to take as you get closer to retirement. Just click "WATCH NOW."

Live with confidence in retirement

5 steps to creating your retirement income plan

If you're thinking about retiring, this webinar is essential for you. You'll learn how different sources of income work, how to build your strategy for lifetime income and what to consider when planning withdrawals from your retirement assets.

WATCH NOW

Diversify your income

How income diversification can improve retirement outcomes

Explore how deploying a mixture of fixed and variable lifetime income sources can help address unique risks in retirement while generating monthly retirement paychecks.

COMING SOON

Pass assets on

Common estate planning considerations

Ensuring that our assets will pass to loved ones and causes that are near and dear is important to most people. Discover the components of a basic estate plan and strategies to ensure that your wishes are met.

WATCH NOW >

Plan ahead with Social Security

Basic considerations and strategies

Social Security will likely play a significant role in building your retirement income. It's part of a critical safety net for most retirees. When you're formulating your retirement plans, it's helpful to understand how and when you can rely on Social Security income.

WATCH NOW

Understand the retirement mosaic

Everything to consider when planning to retire

Explore the non-financial aspects of retirement in a hands-on session that will help you think through the big picture of retirement, and give you tools to optimize your retirement experience.

WATCH NOW >