



A TIAA Financial Essentials webinar

Asset Location—A practical guide for income and estate planning

We often think about our investments in terms of how much we should invest in stocks or bonds or other investments so that we can achieve the greatest return according to our own risk tolerance, goals and time frame. Equally as important is where those assets are located to maximize the benefits of different account types—usually to minimize taxes.

Learn about how the location of your assets may impact your retirement income and your beneficiaries.

Want help?

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

[Schedule online](#)

Or visit TIAA.org/webinars to register.
And it's at no additional cost to you!

Register today for this live webinar on Tuesday, September 17, 12 p.m. to 1 p.m. (ET).

Colleen M. Carcone, CFP®

Director, Wealth Planning Strategies
TIAA Individual Advisory Services

As a Director of Wealth Planning Strategies for TIAA, Colleen provides wealth transfer, estate and tax planning considerations for clients with the most complex needs. Her estate and tax planning knowledge allow her to provide specialized advice and sophisticated planning strategies to high-net-worth families in every aspect of their financial lives.

Jack F. Reetz, Jr., CFP®

Director, Integrated Solutions
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As an Integrated Solutions Director at TIAA, Jack is the primary point of contact for advisors and subject matter expert for TIAA's Managed Solutions, Insured Solutions and Banking offer. He holds FINRA Series 6, 63/66, 26, 7, and 24 registrations in addition to maintaining licenses in life insurance in all appropriate jurisdictions.



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