



CE&A Financial Foundations

New Year Check In

New Year Check In - 2024 Campaign Strategy

Objective:

- Leverage the start of a new year, a time when people are setting new goals, as an opportunity for participants to review their retirement savings and investment strategy and adjust their plan.

Goals:

- **Drive** advice to help ensure participants are maximizing their retirement plan
- **Promote** increased savings rates to help ensure participants can reach their savings goal
- **Build** financial literacy on investing topics

Audience:

- Active participants (non wealth engaged) who have had a contribution to their account within the past 6 months
- Age >18 and <80
- Total Assets > \$0

Marketing Activation:

- Email
- Website main account page banners
- Social Media

Timing:

- Initial deployment early January
- Resend to participants who didn't open/click two weeks after initial deployment

New Year Check In - 2024 Creative Sample

Sample 1

Make the most of your retirement benefit.

Our online planning tools can help.

LET'S DO THIS

A recent *Forbes Health* survey revealed "improving finances" as 2024's second most popular New Year's resolution.*

Make your financial well-being a top priority. It's a key part of your overall health that can improve your mental health, relationships and overall happiness.

Did you have any life changes in 2023? Update your goals for the new year using our Retirement Advisor tool. A quick review of your account can help ensure your plan aligns with your goals for the new year.

GET STARTED >

Exclusive opportunity to learn something new in 2024.

Must-see webinar
Build your financial acumen—join our upcoming webinar "Economic & Market Outlook" on Wednesday, January 10, 2024 at 12:00 EST. [Register here.](#)

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*According to a 2024 *Forbes Health* poll: [forbes.com/health/insider/new-year-resolutions-survey-2024/](#)

Sample 2

Make the most of your retirement benefit.

Consider saving more toward retirement today.

LET'S DO THIS

A recent *Forbes Health* survey revealed "improving finances" as 2024's second most popular New Year's resolution.*

Make your financial well-being a top priority. It's a key part of your overall health that can improve your mental health, relationships and overall happiness.

Good news! The annual limit on salary deferral contributions has increased for 2024 to \$23,000. Increasing your retirement plan contributions even a little at the beginning of the year can make a huge difference later in life when "retiring on time" might be your New Year's priority.

SAVE MORE >

Exclusive opportunity to learn something new in 2024.

Must-see webinar
Build your financial acumen—join our upcoming webinar "The Starting Line" on Wednesday, March 6, 2024 at 12:00 EST. [Register here.](#)

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*According to a 2024 *Forbes Health* poll: [forbes.com/health/insider/new-year-resolutions-survey-2024/](#)

Sample 3

Make the most of your retirement benefit.

A TIAA Financial Consultant can help.

LET'S DO THIS

A recent *Forbes Health* survey revealed "improving finances" as 2024's second most popular New Year's resolution.*

Make your financial well-being a top priority. It's a key part of your overall health that can improve your mental health, relationships and overall happiness.

Meet with a Financial Consultant to discuss whether your investment mix is capturing potential gains while protecting you against market losses to safeguard your retirement savings.

SCHEDULE A MEETING >

Exclusive opportunities to learn something new in 2024.

Must-see webinar Build your financial acumen—join our upcoming webinar "Invest for Success" on Tuesday, January 16, 2024 at 12:00 EST. Register here.	TIAA on-site event A TIAA Financial Consultant will be on site the week of Date XX . Schedule an in-person advice session to get your year off to a great start.
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*According to a 2024 *Forbes Health* poll: [forbes.com/health/insider/new-year-resolutions-survey-2024/](#)

Sample 4

Make the most of your retirement benefit.

A TIAA Financial Consultant can help.

LET'S DO THIS

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Make your financial well-being a top priority. It's a key part of your overall health that can improve your mental health, relationships and overall happiness.

Meet with a TIAA Financial Consultant to help you assess whether you're ready to adjust your portfolio for greater protection, including adding a guaranteed lifetime income component.

SCHEDULE A MEETING >

Exclusive opportunities to learn something new in 2024.

Must-see webinar Build your financial acumen—join our upcoming webinar "Psychology for Life" on Wednesday, March 20, 2024 at 12:00 EST. Register here.	TIAA on-site event A TIAA Financial Consultant will be on site the week of Date XX . Schedule an in-person advice session to get your year off to a great start.
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*According to a 2024 *Forbes Health* poll: [forbes.com/health/insider/new-year-resolutions-survey-2024/](#)

Sample 5

Make the most of your retirement benefit.

A TIAA Financial Consultant can help.

LET'S DO THIS

A recent *Forbes Health* survey revealed "improving finances" as 2024's second most popular New Year's resolution.*

Make your financial well-being a top priority. It's a key part of your overall health that can improve your mental health, relationships and overall happiness.

Meet with a Financial Consultant to review your retirement account and ensure your plan aligns with your goals for the new year.

SCHEDULE A MEETING >

Exclusive opportunities to learn something new in 2024.

Must-see webinar Build your financial acumen—join our upcoming webinar "Economic & Market Outlook" on Wednesday, January 10, 2024 at 12:00 EST. Register here.	A quick read Our latest article, <i>Four Smart Money You Can Make in the New Year</i> can help set you up for a financial success in 2024. Give it a quick read.
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*According to a 2024 *Forbes Health* poll: [forbes.com/health/insider/new-year-resolutions-survey-2024/](#)

Subject Line: <FirstName>, a lasting resolution that's easier than cutting sweets.

Pre-Header: It's time for your New Year's check-in.

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