Because even the best plan deserves a check-in

FINANCIAL ESSENTIALS with TIAA

Even the best plans need regular reviews–and your financial plan is no different. Mid-year is the perfect time to reassess your goals, make updates where needed, and ensure your plan aligns with what matters most to you.

Three ways to make the most of your mid-year check-in

Know where you stand

Take stock of your financial picture—savings, investments, and debt—to see if you're on pace to meet your goals.

Update your plan

Review your budget, contributions, and allocations to ensure they still align with your priorities and risk tolerance—and make changes as needed.

Adjust your habits

Automate what you can and commit to one new positive habit, like increasing your contributions or paying extra toward debt.

Ready to get started?

Access tools, tips, and resources.

READ
Three habits to boost your financial confidence

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