

A comprehensive approach to an employer benefits program includes supporting employee wellbeing by meeting their diverse and changing needs and, ultimately, by helping employees feel more valued.

Comprehensive programs extend beyond traditional benefits, like medical and retirement. They should also include voluntary benefits such as college savings to support employees' financial wellness.

Benefits such as Edvest 529 College Savings Plan can alleviate financial burdens and help employees feel more financially secure beyond income alone.

What's the benefit for you and your employees?

Picture helping your clients provide their employees the opportunity to save thousands of dollars with potential tax-free growth for college savings. Now, imagine it doesn't increase your workload or theirs, or cost the employer a cent.

Introducing our 529 Workplace Savings Program:



Huge Market Opportunity



No minimum company size



Dedicated consultants



No auditing or tax reports

Edvest will help enhance the benefits offering and relationships with your clients. Additionally, incorporating valuable voluntary benefits like college savings to their benefits suite will support employee trust and loyalty.

Edvest is a trusted partner that can support your clients and their employees throughout the year by providing college savings education in the workplace. We will support your vision as a benefits administrator by ensuring your clients have the support and resources they need to succeed.

To set up our initial meeting, please call **414-410-0009**, or email Khaleel.Ali@tiaa.org.

I look forward to serving you and helping make your savings goals a reality.

Sincerely,

Khaleel Ali



KHALEEL ALI

Khaleel.Ali@tiaa.org
414-410-0009

- More than 13 years of experience in the financial service industry
- Plan Specialist for Edvest College Savings Plan
- Counsels families on how to save for college with 529 College Savings Plans

Khaleel came to TIAA-CREF with over 10 years of financial services industry experience. As a Tuition Financing, Inc. Consultant, he serves as the Plan Specialist for the Edvest College Savings Plan. He travels throughout Wisconsin to educate individuals and employers on the benefits of the Edvest 529 College Saving Plan. Khaleel helps others save for higher education through a highly personalized and education-based consultative approach aimed at bridging the gap between needs and tailored solutions.

To learn more about Wisconsin's Edvest College Savings Plan, its investment objectives, tax benefits, risks and costs, please see the Plan Description at Edvest.com. Read it carefully. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. If the funds aren't used for qualified higher education expenses, a 10% penalty tax on earnings (as well as federal and state income taxes) may apply. Check with your home state to learn if it offers tax or other benefits such as financial aid, scholarship funds or protection from creditors for investing in its own 529 plan. Consult your legal or tax professional for tax advice.