

## With new CU investments fund options available, it's a great time to take advantage of professional financial advice at no cost <sup>[1]</sup>



April 5, 2023 by Employee Services <sup>[2]</sup>

Two new ESG investment fund options <sup>[3]</sup> have been added to the investment lineups for the CU 401(a) mandatory retirement plan <sup>[4]</sup>, the CU 403(b) voluntary retirement plan <sup>[5]</sup> and the Student Employee Retirement Plan (SERP) <sup>[6]</sup>.

The new funds, **Vanguard FTSE Social Index Fund** and **Parnassus Core Equity Fund**, have strong historical performance, low costs, and consider environmental, social, and governance (ESG) issues in selecting their investments.

### **Get expert advice on your investments**

This change represents a prime time to review your retirement investment portfolio – and professional assistance is available at no cost to you. Faculty and staff enrolled in CU's mandatory or voluntary retirement plans have access to personalized retirement planning advice through one-on-one meetings <sup>[7]</sup> with a TIAA financial consultant.

A consultation will help you understand your personal savings needs and retirement timeline then provide advice to choose the most appropriate investment strategy. It's recommended that retirement plan enrollees meet with a financial consultant every few years to review their progress and adjust their strategy as needed.

- **To schedule a no-cost TIAA personal financial consultation** [8]: Call 800-732-8353 from 6 a.m. to 8 p.m. (MT) weekdays or schedule a virtual or in-person meeting by visiting [TIAA.org/schedulenow](https://www.tiaa.org/schedulenow) [9].
- **Online account access:** Visit [TIAA.org/cu](https://www.tiaa.org/cu) [10] and log in to your account. Online account access allows you review and change your current investments. If you are a first-time user, click “Log in” on the right side of the gray bar at the very top of the page, then select the “Need online access?” link and follow the prompts.
- **Want to invest in something else?** CU’s retirement plans include a core investment lineup consisting of twenty investment options and a [self-directed brokerage window](#) [11], which allows you direct your retirement investments fund options that are not included in CU’s investment lineup, at your discretion.

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