

As a financial consultant, I know how many savings and investment options are available, and just how overwhelming that can be.

I'm excited to let you know I'll be your dedicated consultant as part of your employee benefits and I am available to discuss your college savings goals.

When it comes to college savings, many people think they can't save enough to make a difference, they won't choose a smart investment, or it will come down to a choice between paying for college or retirement.

First things first, take a deep breath. It's not about paying for everything, it's about saving what you can. And know you're not alone in this. There's a smart way to save for college affordably and conveniently with Edvest.

## What's the benefit for you?

There are many benefits to opening an Edvest account—here are just a few:



**100% tax-free growth**



**Low fees and expenses**



**Financial-aid-friendly**



**Many investment options**

Making decisions about your money can feel complicated. I'm here to make it easier and support you in pursuing your college savings goals.

Let's meet. To set up our initial meeting, please call **414-410-0009**, or book an **appointment**.

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

Sincerely,

*Khaleel Ali*



### **KHALEEL ALI**

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- **More than 10 years of experience in financial services**
- **Plan Specialist for Edvest College Savings Plan**
- **Counsels families on how to save for college with 529 College Savings Plans**

Khaleel came to TIAA with over 10 years of financial services industry experience. As a Tuition Field 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 529 college savings 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.