



Edvest as a Voluntary Employer Benefit: City of Racine

TIAA-CREF Tuition Financing, Inc. (TFI) is the plan manager and TIAA-CREF Individual & Institutional Services, LLC, member FINRA, is distributor and underwriter for the Edvest College Savings Plan, on behalf of the Wisconsin Department of Financial Institutions (DFI), an instrumentality of the State of Wisconsin.

Edvest at Work is a **free** voluntary benefit offered through payroll direct deposit. There is no cost to the employer and no cost to the employee for accessing Edvest through their employer.

TFI will provide **City of Racine** with the following services:

Support & Resources	Services Added	Delivery Dates/Notes (If applicable)
529 educational webinars (live & recorded)	Yes	Employee Presentations - TBD
Dedicated 529 Consultant: Provide employee education and support.	Yes	Khaleel Ali
Resources for your benefits portal: PDF Flyers, Videos, and consultant's letterhead.	Yes	Once SOW and logo received
Support the following events: Open enrollment and benefits/wellness fairs	Yes	When applicable
Benefit announcement support: Email and flyer	Yes	Once SOW and logo received
Promotions: Edvest to provide information and resources for any promotion we offer	Yes	When applicable

City of Racine agrees to supply TFI with its company logo and for TFI to use the logo in marketing and promotion materials (e.g., Edvest.com website, social media applications, or brochures). The social media push is an added benefit we make available to our Workplace Savings employer partners as it yields great brand exposure and goodwill in the public eye, while also serving to position our employer partners as desirable employment destinations. Company logo can be removed from marketing and promotional materials at any time upon request of the company.

This service can be terminated at will.

Sincerely,

Gloria Yvette Haring, Director

Name/Title

Name/Title

03/21/2023

Date

Date

TIAA-CREF Individual & Institutional Services, LLC, Member FINRA and SIPC, distributes securities. Advisory services provided by Advice & Planning Services, a division of TIAA-CREF Individual & Institutional Services, LLC,

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