Because life changes—and your finances should, too

FINANCIAL ESSENTIALS with TIAA

From joyful milestones to life's curveballs, change is part of the journey—and it can affect your financial plan. Taking the right steps can help you feel more prepared, less stressed, and focused on what matters most.

Five milestones to consider

1 Buying a home
Before making the investment, review your debt and credit history, compare mortgage options, and set a budget for any unexpected maintenance costs.

2 Getting married
As you begin your life together, take time to align on financial goals, spending habits, and the choices that will shape your future.

3 Starting a family
Welcoming a child brings new responsibilities—along with a few to-dos, like adding your new dependent to your health plan, updating your beneficiaries, and saving for their future education.

4 Navigating divorce
Divorce can be emotionally and financially draining, but organizing your assets, reviewing your expenses, and seeking expert advice can help you move forward with clarity.

5 Coping with loss
Loss is hard enough. Keeping beneficiary information up to date and documents organized can help make financial decisions simpler for those you love.

Start planning today

Access tools, tips, and resources.

WATCH
Webinar: Planning for life milestones

WATCH
Video: 5 major life events that need financial planning

4972236/3225700/10 2025

TIAA