nuveen
A TIAA Company

Nuveen provides incisive, actionable education for financial professionals and investors. Our goal is to equip you to confidently serve your clients, differentiate your practice and grow your business.

	ADVISOR		INVESTOR	
	CE*	Insights & deep dives	Presentation	Educational content
Tax optimization strategies				
Tax optimization for wealthy clients	●	●	●	●
Tax-advantaged long/short strategies		●		●
1031 UPREIT programs		●		●
High net worth client acquisition strategies				
Wealth transfer for business owners	●	●		●
Wealth transfer planning	●	●	●	●
Why Social Security matters	●	●	●	●
Markets and investments				
Presenting private markets	●	●		●
The power of private markets	●	●	●	●
Your guide to private markets			●	●
Real estate global trends and tactics	●	●		●
Municipal market insights	●	●	●	●
Navigating fixed income	●	●		●
Generating lifetime income	●	●	●	●

Descriptions of each program are on the following page.

*One hour of continuing education (CE) credit is available for Certified Financial Planner (CFP) and Investments and Wealth Institute (IWI), as well as continuing professional education (CPE) for Certified Public Accountants (CPAs).

Tax optimization strategies	DESCRIPTION
Tax optimization for wealthy clients	A framework for implementing highly tax-efficient strategies across short and long-term financial goals, grounded in Nuveen's deep experience developing tax-advantaged solutions for high net worth clients
Tax-advantaged long/short strategies	Insights and solutions when enhanced tax management solutions are needed such as diversifying from concentrated positions or when clients are facing a major liquidity event, like a business sale
1031 UPREIT programs	A deep dive into one of the most tax-efficient real estate transition strategies available, backed by Nuveen's standing as one of the largest real estate investment managers in the industry

High net worth client acquisition strategies	
Wealth transfer for business owners	A comprehensive approach to business transition planning that deepens client relationships and builds a sustainable referral network
Wealth transfer planning	A scalable process for delivering personalized wealth transfer journeys aligned with each family's unique priorities, designed to uncover additional opportunities to add value
Why Social Security matters	An exploration of the key factors that determine Social Security benefit amounts, equipping advisors to guide investors toward informed, confident decisions

Markets and investments	
Presenting private markets	A foundation for advisors to understand and confidently introduce investors to alternative investments, including practical guidance on communicating their value
The power of private markets	A framework for incorporating a range of private market investments into client portfolios, with emphasis on matching the right solutions to individual investor needs
Your guide to private markets	Investor education that makes private markets approachable, supporting your efforts to help clients enhance their portfolios with clarity and confidence
Real estate global trends and tactics	An exploration of the forces driving growth across today's global real estate markets, with sector and regional highlights spanning the U.S., Europe, and Asia-Pacific
Municipal market insights	Actionable intelligence for translating macro dynamics into portfolio positioning, delivered by one of the industry's longest-tenured and most resourced municipal bond managers
Navigating fixed income	A tour of current and emerging themes and value drivers across the major fixed income markets, designed to sharpen portfolio positioning decisions
Generating lifetime income	A roadmap for showing plan sponsors how to make a defined contribution plan feel more like a traditional pension for participants

For more information about Nuveen's educational offerings and how we can help you strengthen your practice, consult your Nuveen representative, or visit us at nuveen.com.

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