



**Katie Rozen**  
Financial Consultant  
333 Bridge Street NW  
Suite 110  
Grand Rapids, MI  
49504  
Direct 616-802-5331  
Fax 614-932-9566  
katie.rozen@tiaa-  
cref.org

## **Katie Rozen** Financial Consultant, Institutional Business, Field Consulting Group

Katie Rozen is a Financial Consultant within the Institutional Business division at TIAA-CREF ([www.tiaa-cref.org](http://www.tiaa-cref.org)), a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields.

Katie is part of the Field Consulting Group, which is composed of more than 300 highly trained, licensed financial consultants focused on improving individuals' financial well-being and retirement readiness.

Katie began her financial services career in 2008 and she has been with TIAA-CREF since 2015. She serves institutions within the Grand Rapids, MI region, and provides financial advice to individuals on income & retirement planning, and improves their financial literacy through one-on-one sessions and specialized educational workshops serving every life stage.

Katie holds an MBA from Baker College and a Bachelor of Business Administration in Finance from University of Michigan-Flint. As a FINRA registered representative, she holds Series 7 and 66 designations while maintaining Life, Health and Variable Annuity licenses from the State of Michigan.



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