Conchy Perez
Senior Financial Consultant, Institutional Retirement

Conchy Perez is a Financial Consultant within the Institutional Solutions & Relationships division at TIAA (www.tiaa.org), a Fortune 100 financial services organization and leading provider of asset management and retirement services for the academic, research, medical and cultural fields.

In her role as a Financial Consultant at TIAA, Conchy is focused on helping participants plan for their financial well-being and retirement readiness. She meets with employees one-on-one and provides personalized counseling, education and advice, including specific asset allocation and fund selection recommendations based on the plan’s investment options.

Conchy began her financial services career in 1982 and she has been with TIAA-CREF since 2011. Prior to TIAA-CREF, Conchy was with Fidelity Investments, Goldman Sachs, Rose & Company Investment Brokers, Inc. and Kidder Peabody & Company. She serves the following Institutions:

- George Washington University (DC & NOVA)
- Carnegie Institution of Washington
- Henry M. Jackson Foundation
- Uniformed Services University of the Health Sciences
- University Of Maryland - Asian Division
- University Of Maryland - European Division
- University of Maryland, University College (UMUC)
- Bowie State University
- The Potomac School
- The Foundation Schools
- Leading Age
- Children’s National Medical Center
- Association of Public Land Grant Universities
- CNA

Conchy holds a Bachelor of Science in Business Administration from Sacred Heart University in San Juan, Puerto Rico. As a FINRA registered representative, she holds Series 7, 8, 63, 66 licenses while maintaining Life, Health and Variable Annuity licenses in 26 states including District of Columbia, Maryland, Pennsylvania, Virginia, Florida, Massachusetts, New York, New Jersey, Illinois and Puerto Rico. A native of Puerto Rico; Conchy is also proficient in Spanish. Additionally, Conchy has obtained the Chartered Retirement Planning Counselor (CRPC) designation from College for Financial Planning and an Executive Certificate in Financial Planning from Georgetown University.

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