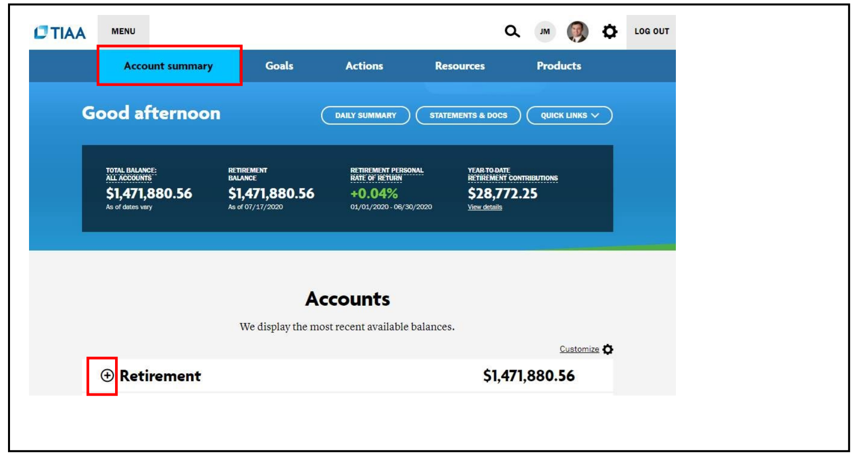
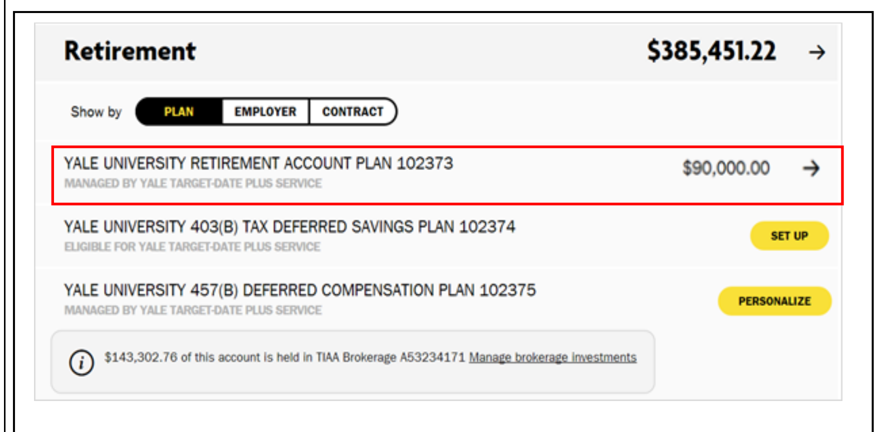
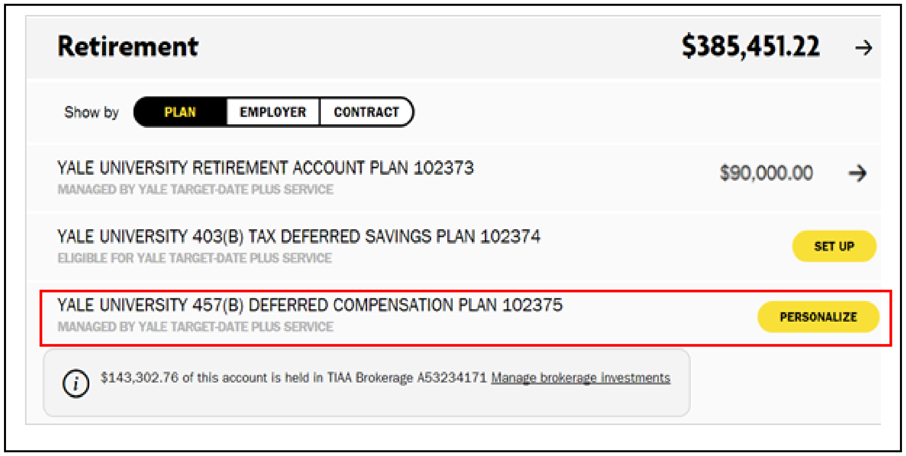
How to transfer legacy balances from your legacy contracts (RA/GRA/SRA/GSRA) to your Target-Date Plus model portfolio (RCP contract).

<table>
<tr><th>Step #</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Log in to your account at TIAA.org/Yale.
On the Account summary tab, under Accounts select the “+” sign next to Retirement to see your Yale Retirement Plans.</td><td>
</td></tr>
<tr><td>2.</td><td>Click the arrow or anywhere within the Plan Name to access the Plan Details page for the contract with the legacy assets to be transferred.</td><td>
</td></tr>
</table>

Screenshots are provided for illustration purposes and are subject to change.

Step #	Action	
2a.	Alternate method: *If you have not yet Personalized the selection of your model portfolio, click Personalize to begin those steps.*	

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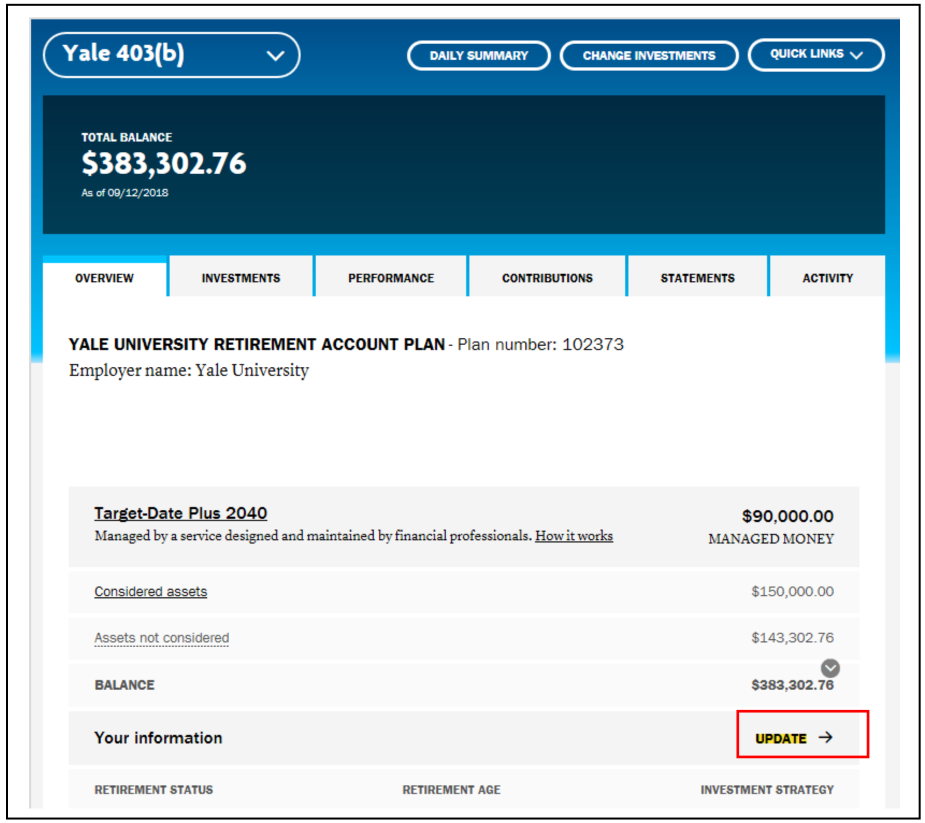
Step #	Action	
3.	If you have previously personalized your model portfolio, click the **Update** link in the **Your Information** section.	

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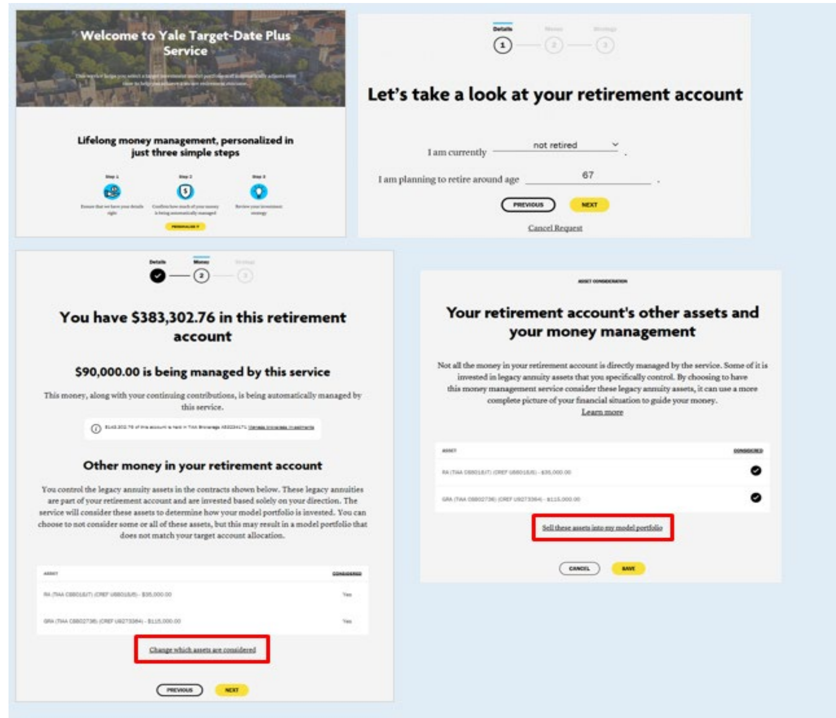
Step #	Action	
3a.	Alternate method: *If you have not yet Personalized the selection of your model portfolio, click Personalize to begin those steps:* Click on **Change which assets are considered**. Then, click on **Sell these assets into my model portfolio**. See step 5 below.	

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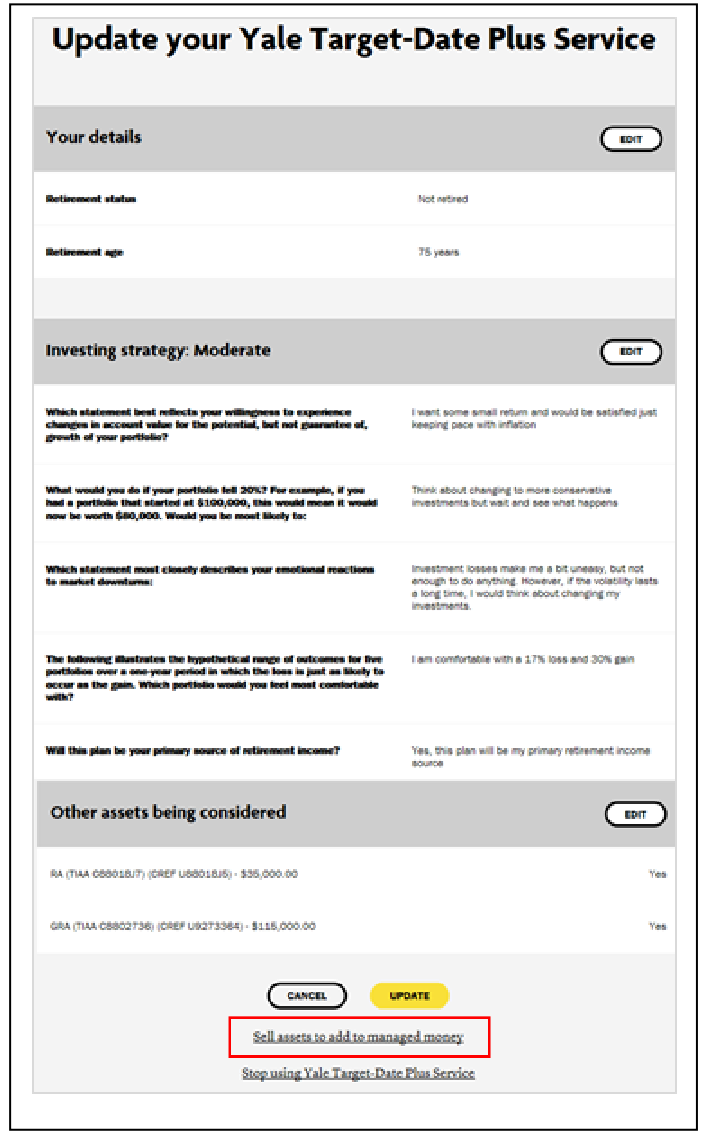
<tr><td>4.</td><td>The Update your Yale Target-Date Plus Service screen displays.

Scroll down and select the Sell assets to add to managed money link.

Note: You can update the current selections by clicking the Edit button for a specific section.</td><td>
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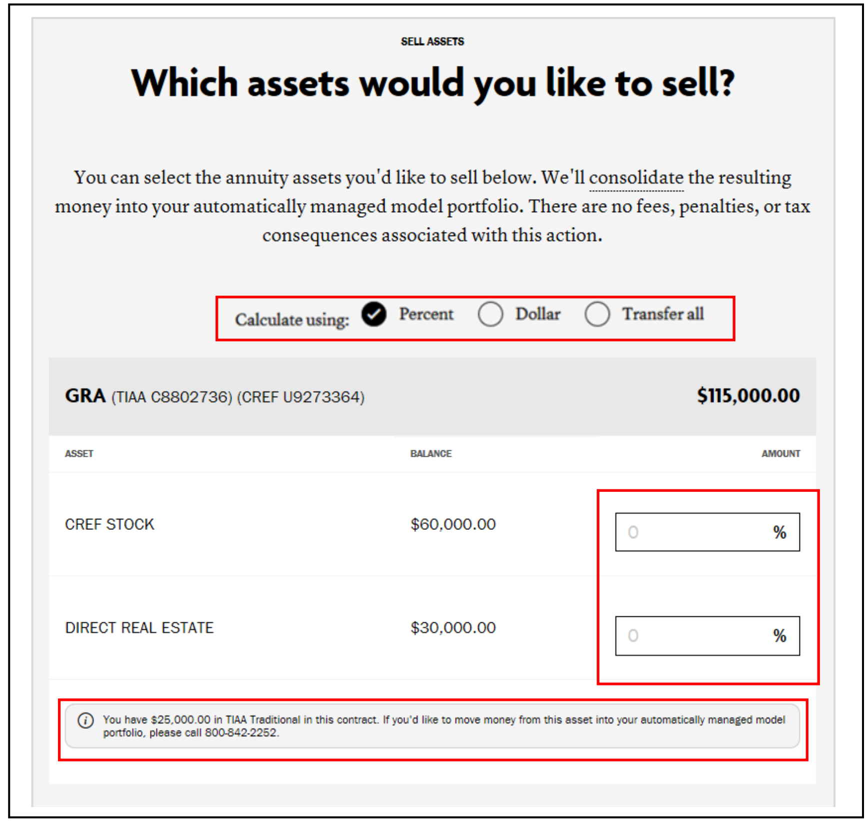
<tr><th>Step #</th><th colspan="2">Action</th></tr>
<tr><td>5.</td><td>The Sell Assets screen displays.

This is where you can select the available mutual funds and/or annuities to include in the Cross-Contract Transfer.

Choose the calculation method by selecting either:
Percent radio button, and entering a whole-digit percentage in the field beside each investment.
Dollar radio button, and entering a dollar amount in the field beside each investment.
Transfer all radio button to transfer 100% of the investments.
Note: TIAA Traditional accumulations, regardless of liquidity, cannot be moved by any of these methods. You must call for assistance with moving TIAA Traditional funds. (See Note at bottom of screen.)</td><td>



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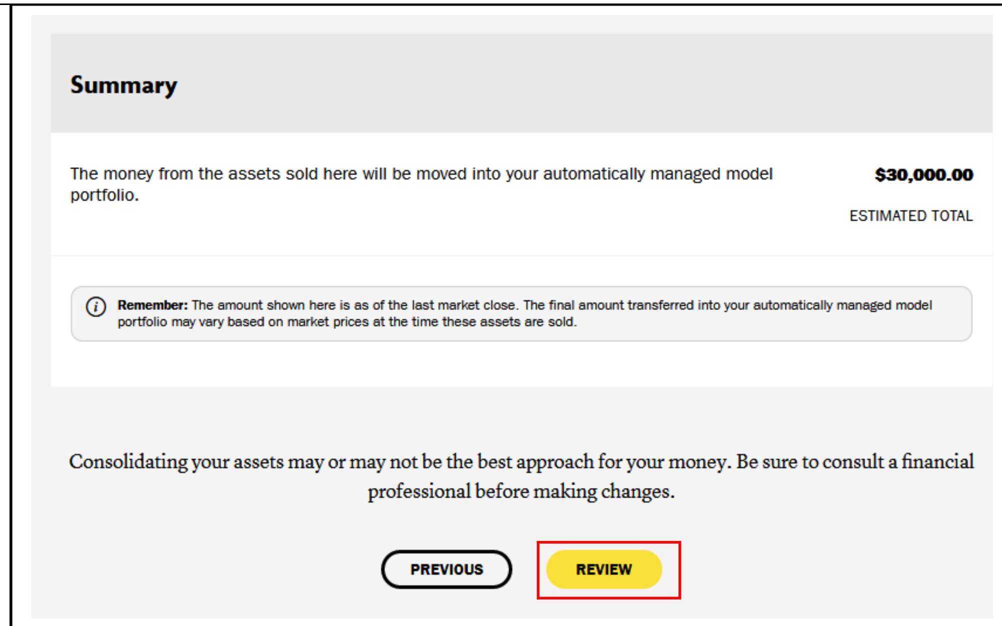
<table>
<tr><th>Step #</th><th>Action</th><th></th></tr>
<tr><td>6.</td><td>Scroll down to the Summary panel.

Click the Review button.</td><td>
</td></tr>
</table>

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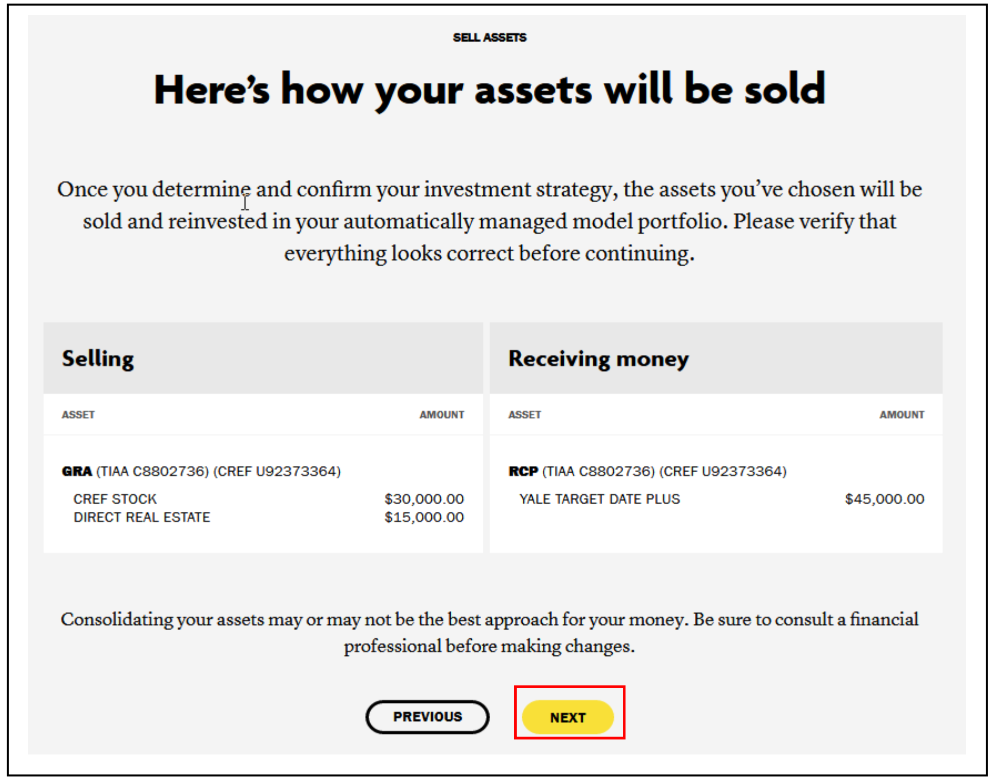
Step #	Action	
7.	Review the transaction summary and click **Next** to proceed. **Note:** The **Receiving money** section reflects the Target-Date Plus model portfolio.	

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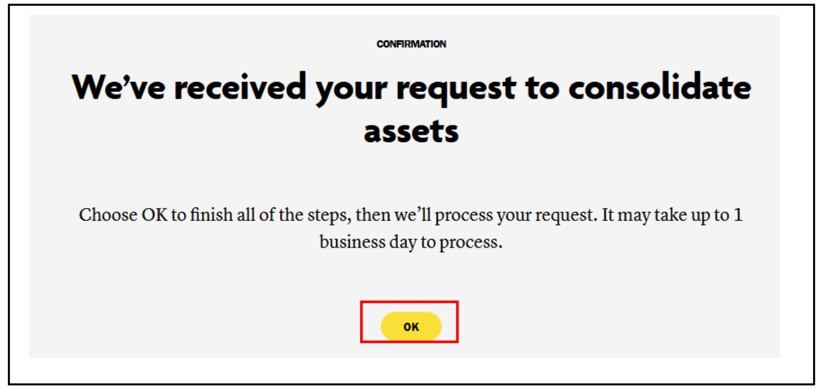
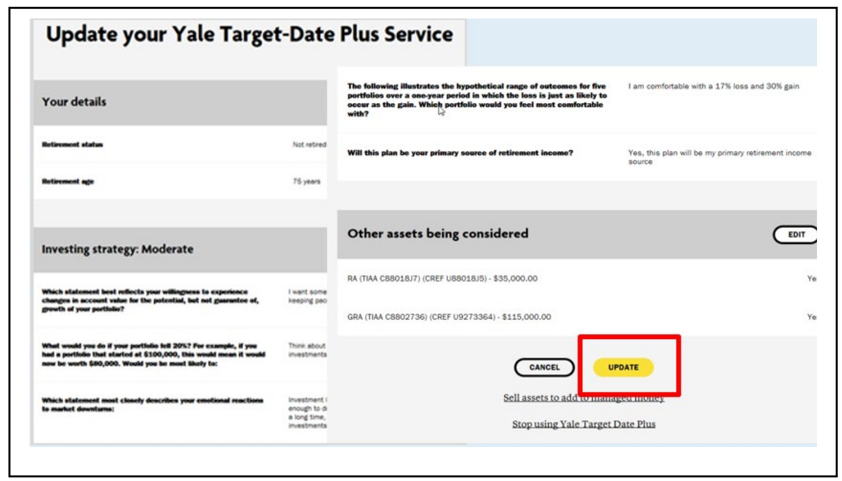
<table>
<tr><th>Step #</th><th colspan="2">Action</th></tr>
<tr><td>8.</td><td>A transaction Confirmation screen displays.
Note: A disclaimer displays estimating the amount of time to complete the transfer. Click OK to return to the Money step.

Note: This process must be followed through to the end or the transfer of balances will not be completed.</td><td>
</td></tr>
<tr><td>9.</td><td>The Update your Yale Target-Date Plus Service screen re-displays.

Scroll down and click the Update link.</td><td>
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Step #	Action
10.	The **Strategy** screen displays. A recommended model displays, along with a description of the investment strategy being used. **Note:** If no other changes were made, the same model will be displayed as was previously recommended. Moving money does not change the model, but it can impact how the Yale Target-Date Plus Service allocates funds to the selected Target-Date Plus model portfolio. To accept the recommended model click **Use Strategy**. **Note**: This process must be followed through to the end or the transfer of balances will not be completed.

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Step #	Action	
11.	The **Review** screen displays. Confirm the model displayed is correct.	

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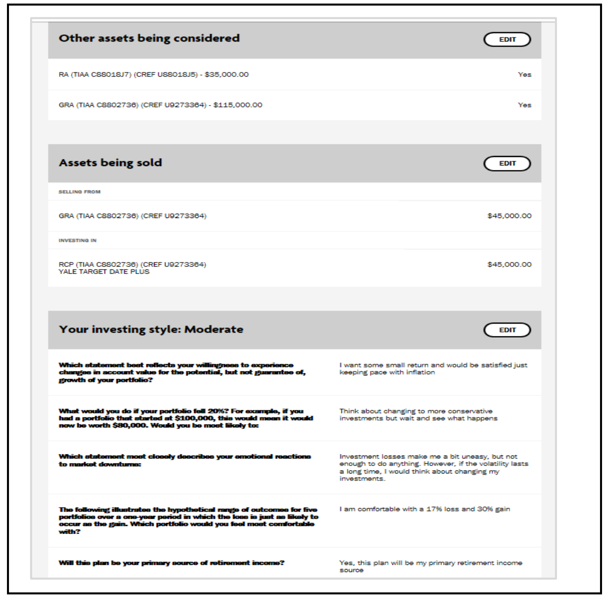
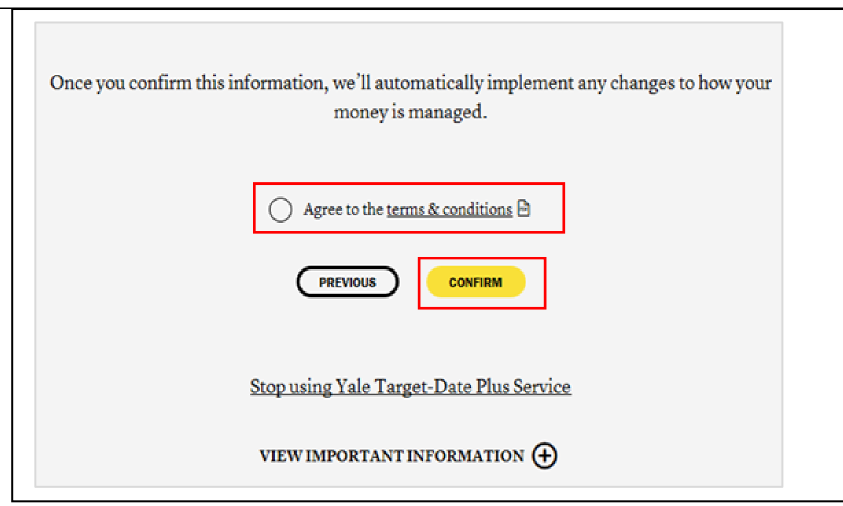
Step #	Action	
12.	Scroll down and review the other panels. Confirm the transfer request displayed is correct.	
13.	Scroll down to the bottom section of the screen. Click **Agree to the terms & conditions**. Click the **Confirm** button.	

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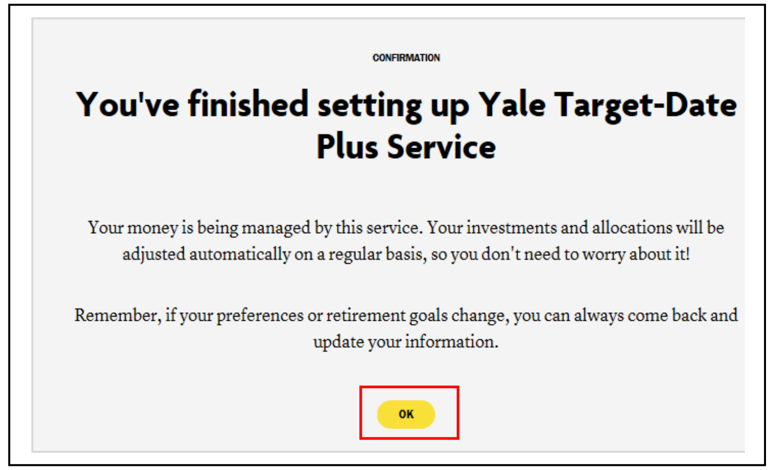
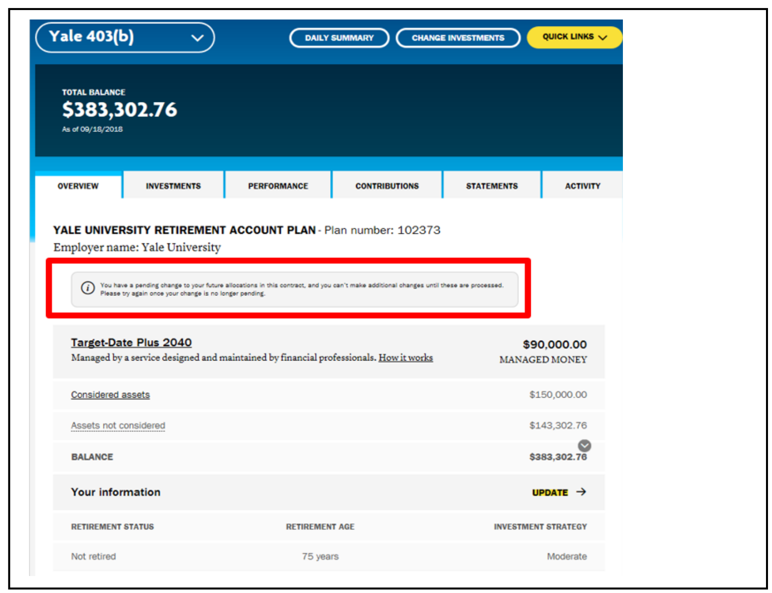
<tr><th>Step #</th><th colspan="2">Action</th></tr>
<tr><td>14.</td><td>The Confirmation screen displays.

Click OK.</td><td>
</td></tr>
<tr><td>15.</td><td>The Plan Details page re-displays.

Note: You will see a “pending transaction” message similar to the one shown in this image. The updated amounts will not be reflected until the next business day.
Note: The pending message may take about 30 minutes to appear while the request is processing.</td><td>
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