

Managing your TIAA account online



You can manage your NYU Langone Health retirement plan account investments easily online through the TIAA participant website

TO LOG IN TO YOUR TIAA ACCOUNT, SIMPLY FOLLOW THE STEPS BELOW

- Visit the Benefits website by going to **atNYULMC.org**.
- Log in using your Kerberos ID and password.
- Select *Human Resources*, then select *Retirement Savings*.
- Once you are on the *Retirement Savings* page, select *Enroll Now* if you are enrolling for the first time. If you are already enrolled in the plan, select *Manage My Account*.
- Once you log in, you will be directed to the *Account Summary* page for your TIAA accounts. This is where you can view and take action on all of your accounts.

TO CUSTOMIZE YOUR ACCOUNT SUMMARY PAGE

- Click *Profile* at the top right of the screen next to the Search box. Click *Customize your account*.
- To choose a background photo for your Summary page, select *Background image (summary page)*.
- To nickname and reorder your accounts, select *Account order & nicknames*.
- To choose a preferred name, select *Preferred name*.

TO UPDATE YOUR BENEFICIARY

- Until you make a beneficiary election, your beneficiary will show as "Estate." To establish or update your beneficiary:
- From the *Account summary* page, go to the *Actions* tab and select *Add/Edit beneficiaries*.
 - You will be asked for your beneficiary's Social Security number, birth date and address.

TO VIEW YOUR ACCOUNT BALANCES

- To view your account balances, go to the *Account summary* page, where they are shown in a numerical format.

TO CHANGE THE AMOUNT OF YOUR CONTRIBUTION

- From the *Account summary* page, select the *Actions* tab and choose *Manage contributions* under the *Retirement plans* heading.
- Click the *Manage contributions* link.
- Click the **MANAGE MY CONTRIBUTIONS** button at the bottom of the *Welcome* page.
- Click the **MANAGE CONTRIBUTIONS** button on the *Contributions* page.
- Review the information on the *Your retirement contributions* page. Select *Yes* or *No* to indicate if you would like to contribute. If *Yes*, provide how much you want to contribute and when you want to start making contributions.
- You have the option to voluntarily set up auto increase for your contributions by selecting a percentage or dollar amount.
- Once you're done, click the *NEXT* button.
- Review your contributions and, when ready, click the **CONFIRM** button to process your request. You can print a copy of the confirmation for your records if you like when you are finished.

TO CHANGE HOW YOUR FUTURE CONTRIBUTIONS WILL BE INVESTED

- From the *Account summary* page, select the *Actions* tab and select *Change investments* under the *Retirement plans* heading.
- From the *How can we help?* page, select *Keep going* and click the *CONTINUE* button below.
- Select *Choose future investments* and pick for incoming money only, and keep what you have now.
- Choose the account you'd like to update and click *NEXT* button below.
- Choose the effective date for the change and choose your funds.
- You can also click the *Ask TIAA?* icon for help from the automated assistant.
- Once you're done, click the *CONTINUE* button.
- Review the information you provided and click box next to *I understand that my selections will replace the elections previously provided by the employer sponsoring this plan, and as such, I will be opting out of auto-enrollment. I understand and want to continue.*
- Select *Submit* to process your request.

TO TRANSFER MONEY BETWEEN INVESTMENT OPTIONS

- From the *Account summary* page, select the *Actions* tab and then select *Change investments* under the *Retirement plans* heading.
- From the *How can we help?* page, select *Keep going* and click the *CONTINUE* button below.
- Select *Exchange* to swap one or more of your current investments for new ones.
- *Choose the account you'd like to update and click NEXT* button below.
- Choose an effective date.
- Choose the investments you'd like to transfer from (you can select either a *Percent* or *Dollars* amount or *Transfer All*).
- Choose the investments you'd like to transfer to. Add the amount that you want to transfer to this investment.
- You can also click the *Ask TIAA?* icon for help from the automated assistant.
- Once you're done, click the *CONTINUE* button.
- Review the information you provided and click box next to *I have reviewed my investment changes and I am ready to submit this request.*
- Select *Submit* to process your request.

TO REBALANCE YOUR PORTFOLIO*

- From the *Account summary* page, select the *Actions* tab and then select *Change investments* under the *Retirement plans* heading.
- From the *How can we help?* page, select *Keep going* and click the *CONTINUE* button below.
- From *How do you want to change your investments?* page, click the **REBALANCE** tile to realign your entire portfolio by investment type or category.
- Follow the prompts to either learn more about your options or simply make your changes.
- You can also click the *Ask TIAA?* icon for help from the automated assistant.

TO GET ADVICE ON HOW TO INVEST YOUR RETIREMENT PLAN ASSETS

- Click the *Resources* tab at the top of the screen and select *All tools & calculators*.
- Click the *GET STARTED* button under *Retirement Advisor*.
- To set up a one-on-one advice session with a TIAA financial consultant, call **855-200-7240**, weekdays, 8 a.m. to 10 p.m. (ET).

HOW TO SIGN UP FOR EDELIVERY

Eliminate mailing time and paper clutter by signing up for eDelivery. You may select which communications you would like to receive electronically, from your account information (Quarterly statements, Tax reporting forms, Transaction confirmations) to required notifications and disclosures (Prospectuses, Annual financial reports, Annual privacy notice, Proxy information, Public disclosures).

- From the *Account summary* page, click the *Actions* tab at the top of the page.
- Select *Update your profile* under the *All accounts* heading and click *Communication preferences* and make your selections.

HAVE QUESTIONS? TIAA IS HERE TO HELP

If you need assistance managing your account online, call **855-200-7240**, weekdays, 8 a.m. to 10 p.m. (ET).

*Rebalancing does not protect against losses or guarantee that an investor's goal will be met.

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