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 UPDATE YOUR BENEFICIARY

Until you make a beneficiary election, your beneficiary will show as "Estate". To establish or update your beneficiary:

- Click *Profile* at the top right of the screen and select *Manage Beneficiaries*.
- You will be asked for your beneficiary's Social Security number (if known), birth date and address.

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 *Profile* tab at the top of the page.
- Select *Communication preferences* and make your selections.

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 *Accounts* tab and choose *Manage contributions* under *Quick links*.
- Click the *Manage contributions* link.
- Select *Manage contribution* for the plan you'd like to increase or decrease or Stop Voluntary Contributions if wanting to stop.
- Click the *Manage contribution* button on the Contributions page.
- Select *Yes* or *No* to indicate if you would like to contribute. If Yes, provide how much you want to contribute, *Pre-Tax* and/or *Roth*, 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, and then click *Next*.
- Review your elections, check the box that you have read and accept the *Terms & Conditions* and select *Confirm*.
- You will receive the confirmation: Your Elections Were Submitted.

TO CHANGE HOW YOUR FUTURE CONTRIBUTIONS WILL BE INVESTED

- From the *Account summary* page, select the *Accounts* tab and then select *Change retirement investments* under *Quick links*.
- From the *How can we help?* page, select *Keep going* and click the *Next* button below.
- Select *Start now* for the *Choose future investments* option.
- Choose the contract you'd like to update and click *Next* button below.
- Enter the adjusted percentage for your existing investments.
- Select the new investments you would like to add and enter the percentage then click *Review*.
- Review your asset allocations and once you're done, click the *Submit* button to process your request.

TO TRANSFER MONEY BETWEEN INVESTMENT OPTIONS

- From the *Account summary* page, select the *Accounts* tab and then select *Change retirement investments* under *Quick links*.
- From the *How do you want to change your investments?* page, select *Swap one or more investments* to exchange one or more of your current investments for new ones.
- Select *Start now*.
- Choose the investments you'd like to transfer from (you can select either a Percent or Dollar amount or Transfer All), and click *Continue*.
- Choose the investments you'd like to transfer to. Add the amount that you want to transfer to this investment.
- Once you're done, click the *Continue* button.
- Review the information you provided and select *Submit* to process your request.

TO REBALANCE YOUR PORTFOLIO*

- From the *Account summary* page, select the *Accounts* tab and then select *Change retirement investments* under *Quick links*.
- From the *How do you want to change your investments?* page, select *Rebalance entire portfolio* to realign your entire portfolio by investment type or category.
- Select *Start now*.
- Select the Account you would like to update and click *Next*.
- From the *Rebalance Account* page, select your *Effective date* and your *Rebalancing method*.
- Follow the prompts to *Choose How Future Contributions Will be Affected by this Rebalance* and *Choose Your Investments,* then select *Continue*.
- Review your changes, check the I *understand and want to continue* button, and select *Submit* to process your request.
- You can also click the *Ask TIAA*? icon for help from the automated assistant.

TO GET GUIDANCE ON HOW TO INVEST YOUR RETIREMENT PLAN ASSETS

- From the *Account summary* page, click the *Plan & Learn* and select *Talk to an advisor*.
- Click the *GET STARTED* button under *Retirement Journey Planner* for self-guided guidance.
- Click *Schedule meeting* to set up a one-on-one session with a TIAA financial consultant, or call **855-200-7240**, weekdays, 8 a.m. to 10 p.m. (ET). Or scan the QR code.

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).

MOBILE APP

Manage your TIAA retirement plan in minutes with the TIAA mobile app - no computer needed.

- Update your contributions
- Update your beneficiaries
- Change your investments
- Track your progress

READY TO START?

Download the free app now.

Android **iOS**

Bank-level security biometric login available

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

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Advisory services are provided by Advice & Planning Services, a division of TIAA-CREF Individual & Institutional Services, LLC, a registered investment adviser.

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