

# Managing your TIAA account online



## You can manage your NYU Langone 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](https://atNYULMC.org).
- Log in using your Kerberos ID and password.
- Select *Human Resources* in the top navigation pane and then select *Retirement Savings*.
- From the Retirement Savings landing 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 Home* page for your TIAA accounts. This is where you can view and take action on all of your accounts.

### TO CUSTOMIZE YOUR HOME PAGE:

- Click the wheel icon at the top right of the screen next to the *Log Out* button.
- To choose a background photo for your summary page, select *Background Image (Summary Page)*.
- To nickname and reorder your accounts, select *Account Order and 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 Home* 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 Home* page, select the *Actions* tab and choose *Change Contribution Amount*.
- Click on the *Manage My Contributions* button.
- Click on the *Manage Elections* button for the specific plan you want to change.
- Enter a specific dollar amount or percentage of each paycheck, or select the maximum annual contribution. You must also indicate an effective date for the change.
- Once you're done, click on the *Continue* button.
- You have the option to voluntarily set up auto increase for your contributions by selecting a percentage.\*
- Review your election and, when ready, click *Submit Changes* to process your request.

### TO CHANGE HOW YOUR FUTURE CONTRIBUTIONS WILL BE INVESTED:

- From the *Account Home* page, select the *Actions* tab and select *Change Your Investments*.
- Select *Choose Future Investments* to select a plan to create a new investment mix for future contributions.
- Select *Make Change*.
- Choose the account you'd like to update.
- Select the effective date for the change and select the investment options to which you want to contribute.
- Once you're done, click the *Preview Changes* button.
- Review the information you provided and, when ready, click *Submit* to process your request.

### TO TRANSFER MONEY BETWEEN INVESTMENT OPTIONS:

- From the *Account Home* page, select the *Actions* tab and then select *Change Your Investments*.

- Select *Exchange* to swap one or more of your current investments for new ones.
- Choose the effective date for your change.
- Go to 2. *Choose the Source Fund (Transfer from)* drop-down menu and pick the investment you want to transfer from (you can select either a dollar amount or a percentage).
- Scroll down to 3. *Choose the Destination Funds (Transfer to)*. Add the dollar amount or percentage that you want to transfer to this account or fund.
- Once you're done, click the *Preview Changes* button.
- Review the information you provided and, when ready, click *Submit* to process your request.

### TO REBALANCE YOUR PORTFOLIO:\*\*

- From the *Account Home* page, select the *Actions* tab and then select *Change Your Investments*.
- Click on the *Rebalance* button to realign your entire portfolio by investment type or category.
- Select a plan to sign up for automatic account rebalancing.
- Choose your rebalancing method and TIAA will automatically rebalance your account one time, annually on your birthday (or the next business day, if your birthday falls on a weekend or a holiday) or both.
- Choose your investments.
- If you're not sure which investments to select, go to the *Don't Know What to Pick?* box and select *Launch Tool* to use the TIAA asset allocation calculator. This calculator will offer you information on how to create your investment mix by asset class, based on your risk tolerance.

### TO GET ADVICE ON HOW TO INVEST YOUR RETIREMENT PLAN ASSETS:

- Click on the *Resources* tab at the top of the screen and select *All Tools and Calculators*.
- Click on 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**.

## 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 Home* page, click on *Actions* tab at the top of the page.
- Select *Update Your Profile* and click on *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. or Saturday, 9 a.m. to 6 p.m. (ET).

\* Available after January 1, 2020.

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

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