



TIAA Brokerage

Options for your retirement and investment planning

TIAA Brokerage can offer you a range of support—to help you plan for the future.



You can call **800-927-3059** for a consultation or to schedule a callback.

You know TIAA as a plan provider, but are you familiar with the many services—available to you today—via a relationship with TIAA Brokerage Services? With brokerage services, you can choose from a variety of online investment screening tools, a range of advisory options, industry research and much more.

Brokerage services can help you build, control and manage a customized portfolio—all based on your goals and financial situation. Whether you're interested in selecting and monitoring your own investments, receiving information from a TIAA advisor or turning the management over to a professional we have options to help you invest the way you want.

Building a plan

With a TIAA retail brokerage account, you have the flexibility to invest for a variety of specialized goals—outside of your retirement plan or IRA—including short-term savings, wealth accumulation, estate or education planning, and cash management. And you always have the option to obtain the support of an advisor or member of our brokerage team.

You may benefit from the following approaches:

Individual investing

- Designed for investors interested in control of their investment decisions
- Access to up-to-date financial news and investment research from Capital IQ, Morningstar, Thomson Reuters and TIAA Investments
- An array of individual stocks, exchange-traded funds, mutual funds and more from which to choose
- Use of online screening tools to research and select mutual funds, stocks, ETFs, fixed income investments and more investments
- You can open a new retail or IRA brokerage account without a minimum balance requirement, no annual maintenance expense and online trades for less than \$10

Assisted investing

- Suited to investors who seek occasional support on a number of investment-related topics
- Access to our team of consultants who can answer account and investment questions, locate investments, as well as our online resources



Which solutions best suit your investing style?

You can choose one approach for one goal, or combine approaches to address your personal needs.

- Individual investing
- Assisted investing
- Professional management via the TIAA Portfolio Advisor program

We can help you select solutions to pursue your personal goals.



ETF and stock research selection tools

Benefit from a suite of powerful online screeners to help you select and compare stocks and exchange-traded funds for your portfolio.

Professional management via the TIAA Portfolio Advisor program*

- Designed for investors who prefer professional financial management and investment expertise for their assets
- Managed accounts that offer customized portfolios based on your personal situation and goals
- A team of TIAA investment professionals to help build an investment strategy based on your objectives

You can take the next step to building a plan—today



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Visit **TIAA.org** to learn more or to open an account online

* Portfolio Advisor is a fee-based advisory services program provided by Advice and Planning Services, a division of TIAA-CREF Individual & Institutional Services, LLC, a registered investment advisor.

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You should consider the investment objectives, risks, charges and expenses carefully before investing. Please call 877-518-9161 or log in to [TIAA.org/prospectuses](https://www.tiaa.org/prospectuses) for current product and fund prospectuses that contain this and other information. Please read the prospectuses carefully before investing.

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