Q2 2020 Facts and Stats

Our second century of helping people pursue financial well-being

Founded more than 100 years ago by one of history’s great philanthropists, Andrew Carnegie, TIAA is committed to helping institutions and individuals pursue positive outcomes through an array of global, diversified financial services and a long-term investment perspective.

Having grown into a Fortune 100 financial services organization, we are grounded by our core values, committed to responsible investing and dedicated to being a force for good, building on our legacy of serving the broad financial needs of those who make a difference in the world.

By the numbers

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<th>Founded in 1918</th>
<th>253 offices in 24 countries</th>
<th>Approximately 16,500 associates¹</th>
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Our customers

5M individuals

15,000 institutions serviced by TIAA²

More than $1.1T in assets under management with holdings in more than 50 countries³

More than 980 financial advisors⁴

More than $480B in benefits paid since 1918³

- According to a recent survey of 20 providers, TIAA is the largest manager of qualified plan stable value assets with $170.3 billion in stable value accumulation values.⁶
- TIAA is the #1 not-for-profit retirement market provider in assets and participant accounts.⁷
- Paid more than $5 billion to retired clients in 2019.
- TIAA Traditional has credited interest rates higher than the guaranteed minimum under one or more contracts every year since 1948.⁸
Investment performance and ratings

95% of TIAA-CREF mutual funds and CREF variable annuities have expense ratios below the median of their respective Morningstar categories.

- 63% of TIAA-CREF mutual funds and CREF variable annuities received an overall Morningstar rating of 4 or 5 stars across all asset classes, (40.5% 4 stars and 22.6% 5 stars).
- Among the highest rated insurance companies in the U.S. by the four leading rating agencies: A.M. Best, Fitch, Moody’s Investors Service and Standard & Poor’s.

Among the
Top 5
Manager of farmland assets worldwide
Largest commercial real estate managers in the world

Diversity and inclusion, community service, awards and recognition

100%
Companies for Working Mothers by Working Mother, 2011-2019
Companies for Executive Women by the National Association for Female Executives, 2020
One of DiversityInc’s Top 50 Companies for the eighth year in a row

rating on the
Human Rights Campaign’s Corporate Equality Index
More than
hours volunteered by associates in local communities

100%

2016–2020
Best Mixed Assets Large Fund Company
5 consecutive years

#1
DALBAR ranks our websites at the top

The Mixed Assets Large Fund award from Refinitiv is based on a review of 39 companies 2016, 30 companies 2017, 30 companies 2018, 30 companies 2019 and 30 companies 2020 risk-adjusted performance.

#1 DC Plan Sponsor
#1 Life & Annuity Consumer
#1 DC Plan Participant