TIAA BROKERAGE

Options for your retirement and investment planning

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

Call **800-842-2252**, weekdays, 8 a.m. to 7 p.m. (ET), for a consultation.

Building a plan

With a TIAA 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.

Whether you're interested in selecting and monitoring your own investments, receiving information from someone at TIAA or turning the management over to a professional, we have options to help you invest the way you want.

Individual investing

- Designed for investors interested in control of their investment decisions
- Access to up-to-date financial news and investment research from Argus Research,[1] Morningstar®, Thomson Reuters and Nuveen
- An array of individual stocks, exchange-traded funds (ETFs), mutual funds and more from which to choose
- Use of online screening tools to research and select mutual funds, stocks, ETFs and fixed-income investments
- Option to open a new self-directed non-IRA (i.e., individual or trust) or IRA brokerage account at no cost, with no annual maintenance expense and the ability to trade stocks and ETFs online for $0

Professional management

- 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
- Portfolio Advisor[2] is a fee-based investment advisory managed account service—a $50,000 minimum investment is required

Which approach best suits your investing style?

Now that you've reviewed the benefits of each investing style, you can choose the style that is right for you. Choose one approach for one goal or combine approaches to address your personal needs.

- Individual investing—Make your own investing decisions using online research tools and resources
- Professional management—Turn the investing decisions over to a professional

Take the next step to building a plan—today

Call TIAA Brokerage at **800-842-2252**, weekdays, 8 a.m. to 7 p.m. (ET), for a consultation.

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

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[2] Portfolio Advisor managed account services are offered through Advice and Planning Services, a division of TIAA-CREF Individual & Institutional Services, LLC, a registered investment adviser and broker/dealer.

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