TIAA

Managing your University of Richmond Retirement Plan made easy!

Need help?

Managing your retirement account is just the beginning.

Financial education

TIAA has resources to help you learn more about saving and managing your finances. Visit **TIAA.org/webinars** to participate in live webinars, or visit **TIAA.org/public/offer/insights** to access information about budgeting, college savings, investing and more.

Online tools and calculators

Visit **TIAA.org/tools** for interactive planning tools.

Get the app

With the TIAA app,* you can:

- **See account details at a glance**
- **Check your contributions and investment mix to see if you're on track**
- **Contact your advisor or get in touch with a TIAA financial consultant**
- **Manage your account 24/7**

Download on the App Store

ANDROID APP ON Google play

* Some features not available on all devices.

TIAA makes it easy to manage your financial future

From the *Actions* tab, you can:

- **Change the contribution amount.** Select *Change contribution amount*. Update the percentage for your contributions or select the maximum contribution according to the current IRS limits and the date to make your change effective. You can also set up the self-directed automatic increase feature to help build your savings faster.
- **Change the investment of future contributions.** Select *Change your investments* from the *Retirement plans* section, then *Choose future investments,* then *Make changes*. Choose each account or contract to update, then enter investment instructions.
- **Transfer assets among plan investment options.** Select *Change your investments* from the *Retirement plans* section, then *Exchange,* then *Make changes*. Choose each account or contract to update, then enter investment instructions.
- **Update your beneficiary designation.** Select *Add/edit beneficiaries* from the *All accounts* section, then select *Add New* to make changes to multiple accounts or *Edit Existing* to update beneficiaries on a specific account.
- **Take care of administrative needs.**
  - Review and update your personal information
  - Check account balances and confirm contributions
  - View and research the performance of the plan's investment options
  - Choose eDelivery

Don't have an online account? Getting set up is easy. Visit **TIAA.org/richmond**, select *Log in* in the top right-hand corner, then *Register for online access*.

UNIVERSITY OF RICHMOND

We're here to help

Not sure where to begin? Let us help you take the next step!

Virtual

Schedule a one-on-one advice session by calling TIAA at **800-732-8353**, weekdays, 8 a.m. to 8 p.m. (ET), or visit **TIAA.org/schedulenow**. There is *no additional cost to you* for this service.

Phone

If you have any questions or would like assistance selecting your new investment options, call TIAA at **800-842-2252**, weekdays, 8 a.m. to 10 p.m.

Online

Manage your account online by going to **TIAA.org/richmond** and selecting *Log in*.

If you're new to TIAA, select *Log in*, then click *Register for online access*. Follow the on-screen directions to gain online access to your account.

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