



TIAA Brokerage account—more investment choices for your retirement

Beginning September 1, 2024, you have the option to open a TIAA Brokerage account within your retirement plan¹. With this account, you can direct your retirement plan contributions among a variety of mutual funds beyond the ones offered through your retirement plan.

Ways to make transactions

- Online: Place orders to buy, sell, or transfer mutual fund shares by logging in at tiaa.org/case
- Contact us: You can place orders with a TIAA financial consultant by calling - - weekdays, a.m. to p.m. (ET). We can also answer questions you have about your brokerage account.

A wide range of mutual funds

With a TIAA Brokerage account, you can independently research and select from thousands of mutual funds including ones from well-known fund families. You can view the mutual fund list once you open a brokerage account or by going to tiaa.org/fundfamilies.



You can start today. Log in to your account at tiaa.org/case or call 800-842-2252, weekdays, 8 a.m. to 7 p.m. (ET).

Brokerage account Q&A

1. How do I open a brokerage account?

Once your employer's retirement plan account is opened, you can follow the steps below to establish the brokerage account. Please note: You'll need a separate brokerage account for each retirement account you hold.

Online:

Step 1 Log in to your retirement account via secure access at tialogin.com/case. From your account's homepage, select the retirement account that is eligible for the self-directed

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