

Retirement Advisor



Describe Your Household

Tell us a little bit about yourself so we can better assist you with your retirement planning needs. Knowing whether others will be dependent upon your retirement income, or if you have other sources of income, helps us to provide you with more accurate recommendations.

Your household

Fields marked with an asterisk (*) are required.

*Your gross annual income [?](#) \$

*Do you have a spouse or partner? [?](#) ☒ Yes ☐ No

*Spouse/Partner gross annual income [?](#) \$

*Spouse/Partner Date of Birth [?](#)

*Do you currently have dependents? [?](#) ☒ Yes ☐ No

*Dependent 1 Age [?](#) [Delete](#)

[+ ADD A DEPENDENT](#)

FAQs

- How can the TIAA-CREF Retirement Advisor help me? [?](#)
- Why is my personal information important for this tool? [?](#)
- Instructional Video: Set Your Goal

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We'll estimate your monthly retirement needs with the purchasing power equivalent of today's dollars, adjusting for estimated taxes and inflation for the last period of your retirement. For example, for every \$100 item you purchased today, you might need \$103 to buy the same item next year. [Learn More](#)

We provide advice on your employer-sponsored retirement plans administered by TIAA-CREF. We do not monitor your retirement assets on an ongoing basis, nor do we update your information on this tool to reflect changes in your personal circumstances. You should periodically monitor your retirement strategy as your needs and personal circumstances change. Results are not guaranteed and do not reflect actual returns on any investment. The TIAA-CREF Retirement Advisor is not a substitute for tax, legal or comprehensive financial planning advice.

The TIAA-CREF Retirement Advisor is a brokerage service provided by TIAA-CREF Individual & Institutional Services, LLC, a registered broker-dealer and member of FINRA. See the [Important Information](#) page for more information. The TIAA-CREF Retirement Advisor is intended for use by U.S. residents only.

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eStatements & Reports

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Research & Performance

Research Investments

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Retirement Advisor



Set Retirement Goal

Based on what you told us, we've estimated your retirement income goal below. You can now use the slider to adjust the income goal to suit you. You'll want to estimate your goal as 80% to 100% of your current after-tax income.

Your Retirement Income Goal

Tip: You'll want to estimate your goal as 80% to 100% of your current after-tax income.

After-tax Retirement
Income Goal

\$ 7,075 / mo 100% of current income

FAQs

- How can the TIAA-CREF Retirement Advisor help me?
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See all

Your Household

Your Gross Annual Income \$60,000
Spouse / Partner Gross Annual Income \$50,000
Spouse / Partner Date of Birth 01/05/1980
Current Dependents Ages 3

Back

Cancel

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Save and Continue

Account Home

360° Financial View

Manage My Portfolio

eStatements & Reports

Advice & Guidance

Individual Advisory
Services

Financial Consultants

Products & Services

Open an Account

Research & Performance

Research Investments

Connect



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Retirement Advisor



Review Retirement Information

Now you can share more information about your financial picture. We'll include all of this information in your personalized plan. You can use the plan to help track all of your retirement savings.

Your TIAA-CREF Retirement Profile			
Current Monthly Contribution ? \$400 / month	Current Risk Level ? Moderate	Your Estimated Retirement Age ? 67 EDIT	Spouse / Partner Retirement Age ? 67 EDIT
+ Your Retirement Assets Held at TIAA-CREF Review your TIAA-CREF accounts.			\$16,173

FAQs

- How can the TIAA-CREF Retirement Advisor help me? ?
- Why is my personal information important for this tool? ?
- Instructional Video: Set Your Goal

See all ▶

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

+ Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts	\$36,000
Add / edit your other TIAA-CREF and external accounts earmarked for retirement.	
+ Your Other Retirement Income	\$3,000
Add / edit your other retirement income such as Social Security, pensions, etc.	
+ Life Insurance	\$1,000,000
Add / edit your existing life insurance policies.	

Back

Cancel

Save and Return Later

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Account Home

360° Financial View

Manage My Portfolio

eStatements & Reports

Advice & Guidance

Individual Advisory Services

Financial Consultants

Products & Services

Open an Account

Research & Performance

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Connect



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Open An Account

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Retirement Advisor

DescribeYour Household

SetRetirement Goal

ReviewRetirement Information

PickYour Strategy

TakeAction

Review Retirement Information

Now you can share more information about your financial picture. We'll include all of this information in your personalized plan. You can use the plan to help track all of your retirement savings.

Your TIAA-CREF Retirement Profile

Current Monthly Contribution ⓘ\$400 / month

Current Risk Level ⓘModerate

Your Estimated Retirement Age ⓘ67EDIT

Spouse / Partner Retirement Age ⓘ67EDIT

− Your Retirement Assets Held at TIAA-CREF\$16,173

Review your TIAA-CREF accounts.

TIAA-CREF RETIREMENT ACCOUNTS	ASSET ALLOCATION	CONTRIBUTION	BALANCE
ABC UNIVERSITY RETIREMENT PLAN RA D1234567	Moderate	\$ 400 /mo	\$16,173
Total TIAA-CREF Assets:			\$16,173

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

− Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts\$36,000

Add / edit your other TIAA-CREF and external accounts earmarked for retirement.

To get the most relevant advice for your situation, including a more accurate savings goal and picture of retirement, we recommend you include all accounts you have earmarked for retirement. We will take into account information you provide about other retirement assets inside and outside of TIAA-CREF when generating advice on diversifying your retirement assets at TIAA-CREF. [Learn More](#)

Add Another Account

Your Accounts

ACCOUNT NAME		BALANCE	
+ Roth IRA	EDIT	\$6,000Delete	
− ABC 401(K)	EDIT	\$12,000Delete	
ACCOUNT TYPE	COMPANY	CONTRIBUTION	ASSET ALLOCATION
Tax Deferred Retirement Plan	Other	\$50	Moderate
Total:		\$18,000	

Your Spouse / Partner Accounts

ACCOUNT NAME		BALANCE	
+ Roth IRA	EDIT	\$6,000Delete	
+ ABC 401(K)	EDIT	\$12,000Delete	
Total:		\$18,000	

− Your Other Retirement Income\$3,000

Add / edit your other retirement income such as Social Security, pensions, etc.

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Add Another Income Source

Your Accounts

ACCOUNT NAME		MONTHLY INCOME	
− Social Security	EDIT	\$1,000 / moDelete	
Calculate my estimated Social Security benefits			
Start age67			
Enter my Social Security benefit amount			
+ Pension	EDIT	\$500 / moDelete	
Total:		\$1,500 / mo	

Your Spouse / Partner Accounts

ACCOUNT NAME		MONTHLY INCOME	
+ Social Security	EDIT	\$1,000 / moDelete	
− Pension	EDIT	\$500 / moDelete	
INCOME TYPE	START YEAR	END YEAR	ADJUSTMENT
Pension	2020	2030	Yes
Total:		\$1,500 / mo	

− Life Insurance\$1,000,000

Add / edit your existing life insurance policies.

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Add Life Insurance

POLICY NAME	FACE VALUE AMOUNT
Social Security	\$1,000,000Delete
Total: \$1,500 / mo	

Please select how important it is for you to have life insurance coverage for your dependents over the age of 18.

Neutral

The basic objective of life insurance is to replace some or all of the future income lost due to your death. If you are the primary wage earner, this future labor income may be critical to the financial stability of your beneficiaries. How importnat is it to you to ensure your beneficiaries receive a significant portion of your future labor income if you should die before reaching your target retirement?

Neutral

Back

Cancel

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Save and Continue

Account Home360° Financial View

Manage My PortfolioeStatements & Reports

Advice & GuidanceIndividual Advisory ServicesFinancial Consultants

Products & ServicesOpen an Account

Research & PerformanceResearch Investments

Connect

f

in

t

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ADVICE & GUIDANCE

PRODUCTS & SERVICES

RESEARCH & PERFORMANCE

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Review Retirement Information

Now you can share more information about your financial picture. We'll include all of this information in your personalized plan. You can use the plan to help track all of your retirement savings.

Your TIAA-CREF Retirement Profile

Current Monthly Contribution

\$400 / month

Current Risk Level

Moderate

Your Estimated Retirement Age

67 EDIT

Spouse / Partner Retirement Age

67 EDIT

+ Your Retirement Assets Held at TIAA-CREF

Review your TIAA-CREF accounts.

\$16,173

FAQs

- How can the TIAA-CREF Retirement Advisor help me?
- Why is my personal information important for this tool?
- Instructional Video: Set Your Goal

See all

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

+ Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts

Add / edit your other TIAA-CREF and external accounts earmarked for retirement.

+ Your Other Retirement Income

Add / edit your other retirement income such as Social Security, pensions, etc.

+ Life Insurance

Add / edit your existing life insurance policies.

Back

Cancel

Save and Return Later

Save and Continue

Account Home

360° Financial View

Manage My Portfolio

eStatements & Reports

Advice & Guidance

Individual Advisory Services

Financial Consultants

Products & Services

Open an Account

Research & Performance

Research Investments

Connect



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ONLINE PRIVACY POLICY

TERMS & CONDITIONS

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- ACCOUNT HOME ▾
- MANAGE MY PORTFOLIO ▾
- ADVICE & GUIDANCE ▾
- PRODUCTS & SERVICES ▾
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Your TIAA-CREF Retirement Profile

Current Monthly Contribution ⓘ

\$400 / month

Current Risk Level ⓘ

Moderate

Your Estimated Retirement Age ⓘ

67 [EDIT](#)

Spouse / Partner Retirement Age ⓘ

67 [EDIT](#)

⊖ Your Retirement Assets Held at TIAA-CREF

\$16,173

Review your TIAA-CREF accounts.

TIAA-CREF RETIREMENT ACCOUNTS	ASSET ALLOCATION	CONTRIBUTION	BALANCE
ABC UNIVERSITY RETIREMENT PLAN RA D1234567	Moderate	\$ 400 /mo	\$16,173

Total TIAA-CREF Assets: \$16,173

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

⊖ Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts

\$0

Add / edit your other TIAA-CREF and external accounts earmarked for retirement.

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Add Another Account

⊖ Your Other Retirement Income

\$0

Add / edit your other retirement income such as Social Security, pensions, etc.

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Add Another Income Source

⊖ Life Insurance

\$0

Add / edit your existing life insurance policies.

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Back

Cancel

Save and Return Later

Save and Continue

Account Home

360° Financial View

Manage My Portfolio

eStatements & Reports

Advice & Guidance

Individual Advisory Services

Financial Consultants

Products & Services

Open an Account

Research & Performance

Research Investments

Connect

f

in

t

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PRODUCTS & SERVICES

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Retirement Advisor



Review Retirement Information

Now you can share more information about your retirement plan. You can use the plan to

Your TIAA-CREF Retirement

Current Monthly Contribution
\$400 / month

Your Retirement Assets

Review your TIAA-CREF Retirement Assets

TIAA-CREF RETIREMENT

ABC UNIVERSITY
RA D1234567

Add Another Retirement Account

To get the most relevant advice for your situation, including a more accurate savings goal and picture of your retirement, we recommend you include all accounts you have earmarked for retirement.

Account Name

Spouse / Partner Owned ☐ Yes ☒ No

Financial Services Company

Type

Monthly Contribution

Asset Allocation

Balance

Add Account

Cancel

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts

Add / edit your other TIAA-CREF and external accounts earmarked for retirement.

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Add Another Account

Your Other Retirement Income

Add / edit your other retirement income such as Social Security, pensions, etc.

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Add Another Income Source

Life Insurance

Add / edit your existing life insurance policies.

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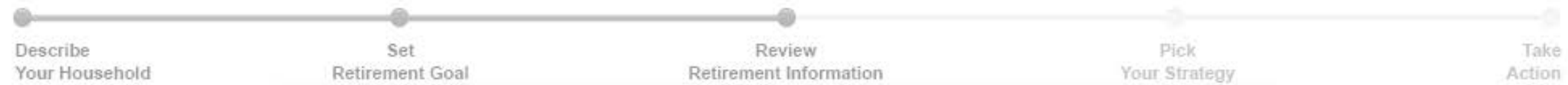
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PRODUCTS & SERVICES

RESEARCH & PERFORMANCE

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Review Retirement Information

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Your TIAA-CREF Retirement

Current Monthly Contribution

\$400 / month

Your Retirement Assets

Review your TIAA-CREF retirement assets.

TIAA-CREF RETIREMENT

ABC UNIVERSITY
RA D1234567

Include Another Income Source

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Income Name

Spouse / Partner Owned ☐ Yes ☒ No

Income Type

Start Year

End Year

Include Cost of Living Adjustments ☐ Yes ☒ No

Monthly Income \$

Add Income

Cancel

Other Retirement Considerations

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Your Other Retirement Income

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Add Another Income Source

Life Insurance

Add / edit your existing life insurance policies.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin eget cursus massa. Nam in eros ipsum. Proin porta pellentesque lectus, sit amet eleifend magna. [Learn More](#)



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Open An Account

ACCOUNT HOME

MANAGE MY PORTFOLIO

ADVICE & GUIDANCE

PRODUCTS & SERVICES

RESEARCH & PERFORMANCE

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Review Retirement Information

Now you can share more information about your retirement plan. You can use the plan to

Your TIAA-CREF Retirement

Current Monthly Contribution
\$400 / month

Your Retirement Assets

Review your TIAA-CREF Retirement Assets

TIAA-CREF RETIREMENT

ABC UNIVERSITY
IRA D1234567

Confirm you want to delete account

Are you sure you want to delete the following account?

Income Name Roth IRA
Spouse / Partner Owned No
Financial Services Company Other
Type Roth IRA
Monthly Contribution \$50
Asset Allocation Moderate
Balance \$6,000

Delete Account

Cancel

Total TIAA-CREF Assets: **\$16,173**

Other Retirement Considerations

To make sure you stay on track, update your details at least once a year, or when there are significant changes in your financial circumstances.

Other TIAA-CREF and Non-TIAA-CREF Retirement Accounts **\$36,000**

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Add Another Account

Your Accounts

ACCOUNT NAME		BALANCE	
+ Roth IRA	EDIT	\$6,000	Delete
- ABC 401(K)	EDIT	\$12,000	Delete
ACCOUNT TYPE	COMPANY	CONTRIBUTION	ASSET ALLOCATION
Tax Deferred Retirement Plan	Other	\$50	Moderate

Total: **\$18,000**

Your Spouse / Partner Accounts

ACCOUNT NAME		BALANCE	
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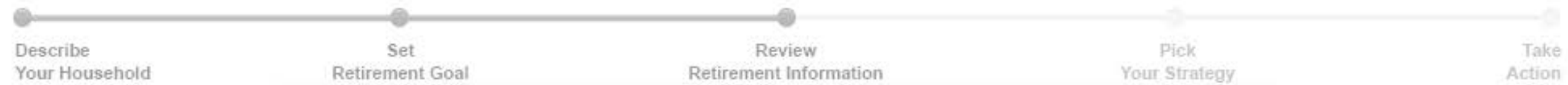
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ADVICE & GUIDANCE

PRODUCTS & SERVICES

RESEARCH & PERFORMANCE

Retirement Advisor



Review Retirement Information

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Your TIAA-CREF Retirement Accounts

Current Monthly Contribution
\$400 / month

Your Retirement Assets
Review your TIAA-CREF retirement accounts

TIAA-CREF RETIREMENT ACCOUNT

ABC UNIVERSITY
IRA D1234567

Edit Account

To edit your account, make your desired changes and select the **Update Account** button.

Account Name

Spouse / Partner Owned ☐ Yes ☒ No

Financial Services Company **Other**

Type **Roth IRA**

Monthly Contribution \$ **50**

Asset Allocation **Moderate**

Balance \$ **6,000**

Update Account

Cancel

How can the TIAA-CREF Retirement Advisor help me?

Is my personal information important for this tool?

Instructional Video: Your Goal

Other Retirement Considerations

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Your Accounts

ACCOUNT NAME		BALANCE	
Roth IRA	EDIT	\$6,000	Delete
ABC 401(K)	EDIT	\$12,000	Delete
ACCOUNT TYPE	COMPANY	CONTRIBUTION	ASSET ALLOCATION
Tax Deferred Retirement Plan	Other	\$50	Moderate

Total: **\$18,000**

Your Spouse / Partner Accounts

ACCOUNT NAME		BALANCE	
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Retirement Advisor



Pick Your Strategy

Take a look at the chart. Are you going to meet your goals? You can choose our proposed strategy, or create your own. Explore what's possible using different contribution amounts, risk levels and retirement ages. Then choose the plan that's right for you—ours or your own.

Your Predicted Outcomes



	Current Situation	Proposed Strategy	Alternate Strategy
Estimated Retirement Income	\$5,851 / month \$1,224 GAP	\$7,095 / month \$20 SURPLUS	Try another strategy ▸
Your Contributions	\$650 / month	\$942 / month	Not ready for big changes? Small steps can help you get closer to reaching your goal.
Retirement Age	67	67	
Risk Tolerance*	Very Aggressive	Very Aggressive	
		<input checked="" type="checkbox"/> Choose this strategy	

[Back](#)

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▪ [Why is my personal information important for this tool?](#) ?

▪ [Instructional Video: Set Your Goal](#) 📺

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Pick Your Strategy

Take a look at the chart. Are you going to meet your goals? You can choose our proposed strategy, or create your own. Explore what's possible using different contribution amounts, risk levels and retirement ages. Then choose the plan that's right for you—ours or your own.

Your Predicted Outcomes



	Current Situation	Proposed Strategy	Alternate Strategy
Estimated Retirement Income	\$5,851 / month \$1,224 GAP	\$7,095 / month \$20 SURPLUS	
Your Contributions	\$650 / month	\$942 / month	\$ 1200 / month
Retirement Age	67	67	66
Risk Tolerance*	Very Aggressive	Very Aggressive	Moderate Aggressive ▾
		<input type="checkbox"/> Choose this strategy	Recalculate

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Account Home

[360° Financial View](#)

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[eStatements & Reports](#)

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[Individual Advisory Services](#)

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Retirement Age	67	67	66
Risk Tolerance*	Very Aggressive	Very Aggressive	Moderate Aggressive ▾
		<input type="checkbox"/> Choose this strategy	<input checked="" type="checkbox"/> Choose this strategy

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- Instructional Video: [Set Your Goal](#)

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Account Home

360° Financial View

Manage My Portfolio

eStatements & Reports

Advice & Guidance

Individual Advisory Services

Financial Consultants

Products & Services

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Staying on track isn't easy, we can help

You're taking the first step towards staying on track with your selected strategy and meeting your goals. That's great! But staying on track isn't easy. Enroll your plans in our Retirement Plan Portfolio Manager and we can help you get there.



A Dedicated Team

A team of dedicated investment professionals can help keep you on track to meeting your retirement planning goals.



Automatic Rebalancing

Your portfolio will be automatically rebalanced every quarter to keep it aligned with your retirement goals.



Annual Check Ups

Once a year, we will revisit your retirement investment strategy to ensure it remains aligned with your goals and situation.

FAQs

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Would you like to enroll your plans in Retirement Plan Portfolio Manager?

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Account Home

[360° Financial View](#)

Manage My Portfolio

[eStatements & Reports](#)

Advice & Guidance

[Individual Advisory Services](#)

[Financial Consultants](#)

Products & Services

[Open an Account](#)

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