

Custom Portfolio: IWC / My TC changes to prototype

Prepared By: Rahsaan Hunter
Date: Sept 4th, 2013
version 1



User Experience Design



Financial Services

- MY PORTFOLIO
- MANAGE ACCOUNT
- ADVICE & GUIDANCE
- PRODUCTS & SERVICES
- RESEARCH & PERFORMANCE

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

Select a contract to create a new allocation for **future contributions**. If you've signed up for automatic rebalancing, this transaction will not change your rebalancing instructions. You can also [transfer assets between funds](#).

Select a Plan		
PLAN NAME	ACCUMULATION AS OF 06/21/2013	IMPORTANT NOTES
INSTITUTION 403(B) DEFINED CONTRIBUTION RETIREMENT PLAN GSRA (TIAA L26470I3) (CREF M26470I1) Plan Number: 10043	\$77,476.66	This plan is: SUBSCRIBED to Managed Portfolio
ROTH IRA GSRA (TIAA V2098002) (CREF W344532) Plan Number: 21765	\$104,220.76	
INDIVIDUAL ACCOUNT GSRA (TIAA L2096051) (CREF M245831) Plan Number: 19568	\$244,035.00	
INSTITUTION 403(B) DEFINED CONTRIBUTION RETIREMENT PLAN GSRA (TIAA V3424253) (CREF W349988) Plan Number: 13497	\$139,010.78	This plan is ELIGIBLE for a Managed Portfolio <div>Enroll now</div>

Resources

- How do I decide between pre-tax and after-tax dollars?
- How much are others saving?
- What plans are right for me?
- Why is it important to save for retirement?
- How much should I contribute?

C4215

My Portfolio

360° Financial View

Profile & Settings

Manage Accounts

Statement & Reports

Advice & Guidance

Investment Advice

Products & Services

Open An Account

Research & Performance

Research Investments

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[LEARN MORE](#)

1.0.0 Now Eligible

- 1 Bold copy
- 2 Bold copy
- 3 “Enroll now” Button: takes the user to 1.1.0 Intro

Investment, insurance and annuity products are not FDIC insured, are not bank guaranteed, are not deposits, are not insured by any federal government agency, are not a condition to any banking service or activity, and may lose value.

TIAA-CREF Individual & Institutional Services, LLC and Teachers Personal Investors Services, Inc., members [FINRA](#), distribute securities products. Annuity contracts and certificates are issued by Teachers Insurance and Annuity Association (TIAA) and College Retirement Equities Fund (CREF), New York, NY.



Financial Services

- 1MY PORTFOLIO ▾
- MANAGE ACCOUNT ▾
- ADVICE & GUIDANCE ▾
- PRODUCTS & SERVICES ▾
- RESEARCH & PERFORMANCE ▾

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

2Pick Your Investments

Choose a Mangaged Portfolio

A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds

Review a list of all available investment options and create your own mix.

3Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

4Begin Investment Profile Questionnaire

5Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose [redemption fees](#) on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

1.1.0 Intro

- 1New nav: new navigation will be released before this release, so included in comps.
- 2Add header
- 3Change header and paragraph copy
- 4Change button copy
- 5Change “Back” link to button and move to the left.

My TIAA-CREF

My Accounts
Manage My Portfolio
My Profile

Advice & Planning

Advice
Learning Center
Insights & Outcomes
Web Seminars
Tools & Calculators
Publications
Video

Products & Services

Retirement Plans
IRAs
Mutual Funds
After-Tax Annuities
Life Insurance
Brokerage Services
Managed Accounts
Education Savings
Consultations & Seminars

Research & Performance

Market Research
Retirement Investments
IRAs
Funds - Retail Class
Funds - Institutional Class
After-Tax Annuities
Life Insurance
529 Plans

About TIAA-CREF

Why TIAA-CREF
How We Invest
Pressroom
Careers
Governance
TIAA-CREF Library
Fellowships & Awards

Have a question?

- Talk to us at 800 842-2252
- Have a consultant contact you

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)



Financial Services

- MY PORTFOLIO ▾
- MANAGE ACCOUNT ▾
- ADVICE & GUIDANCE ▾
- PRODUCTS & SERVICES ▾
- RESEARCH & PERFORMANCE ▾

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

Pick Your Investments

Choose a Mangaged Portfolio

A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds

Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

Investment Objectives3 questions

1

✓

I am saving for retirement | edit

2

Q:

Which of the following best describes your investment objective?

4

I am seeking:

☐ Income and captial preservation

☒ Growth and income3

☐ Long-term growth

☐ Aggressive growth and speculative investments

+

Risk Tolerance5 questions

+

Time Horizon2 questions

Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose [redemption fees](#) on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

My TIAA-CREF

- My Accounts
- Manage My Portfolio
- My Profile

Advice & Planning

- Advice
- Learning Center
- Insights & Outcomes
- Web Seminars
- Tools & Calculators
- Publications
- Video

Products & Services

- Retirement Plans
- IRAs
- Mutual Funds
- After-Tax Annuities
- Life Insurance
- Brokerage Services
- Managed Accounts
- Education Savings
- Consultations & Seminars

Research & Performance

- Market Research
- Retirement Investments
- IRAs
- Funds - Retail Class
- Funds - Institutional Class
- After-Tax Annuities
- Life Insurance
- 529 Plans

About TIAA-CREF

- Why TIAA-CREF
- How We Invest
- Pressroom
- Careers
- Governance
- TIAA-CREF Library
- Fellowships & Awards

Have a question?

- Talk to us at 800 842-2252
- Have a consultant contact you

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)

1.1.1 Question 2

- 1 Replace check icon:** image provided in seperate file.
- 2 Replace “Q” icon:** image provided in seperate file.
- 3 Selecting an answer:** make answer copy containter a clickable area to select the answer in addtion to the small radio button area.
- 4 Question transistion:** Per usability feed, The transitions between the risk profile questions is a little disorienting. The page appears to jump, making it hard to see the result of the last action and focus attention on the next. Is it possible for prototype to make this transition a little less jarring?



Financial Services

- MY PORTFOLIO ▾
- MANAGE ACCOUNT ▾
- ADVICE & GUIDANCE ▾
- PRODUCTS & SERVICES ▾
- RESEARCH & PERFORMANCE ▾

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

Pick Your Investments

Choose a Mangaged Portfolio

A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds

Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

+ Investment Objectives

Complete

- Risk Tolerance

5 questions

Inflation, the rise in prices over time, can erode your investment return. If portfolio returns are less than the inflation rate, your ability to purchase goods and services in the future might actually decline. However, there is a higher degree of risk associated with portfolios that seek long-term returns that significantly exceed inflation. I am going to describe several investment portfolios to you.

Q: Which of the portfolios most closely reflects your investment philosophy?

I would be most comfortable with:

☐ Portfolio 1, which is most likely to exceed long-term inflation by a significant margin and has a high degree of risk.

☐ Portfolio 2, which is most likely to exceed long-term inflation by a significant margin and has a high degree of risk.

☐ Portfolio 3, which is most likely to exceed long-term inflation by a significant margin and has a high degree of risk.

☐ Portfolio 4, which is most likely to exceed long-term inflation by a significant margin and has a high degree of risk.

+ Time Horizon

2 questions

Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose [redemption fees](#) on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

1.1.1 Question 4

- 1

New paragraph: start a new paragraph for the question at the end of the current paragraph for the first 3 risk tolerance questions.
- 2

Realign“Q” Icon: align “Q” icon with the question created by (1) above.

My TIAA-CREF

My Accounts
Manage My Portfolio
My Profile

Advice & Planning

Advice
Learning Center
Insights & Outcomes
Web Seminars
Tools & Calculators
Publications
Video

Products & Services

Retirement Plans
IRAs
Mutual Funds
After-Tax Annuities
Life Insurance
Brokerage Services
Managed Accounts
Education Savings
Consultations & Seminars

Research & Performance

Market Research
Retirement Investments
IRAs
Funds - Retail Class
Funds - Institutional Class
After-Tax Annuities
Life Insurance
529 Plans

About TIAA-CREF

Why TIAA-CREF
How We Invest
Pressroom
Careers
Governance
TIAA-CREF Library
Fellowships & Awards

Have a question?

- Talk to us at **800 842-2252**
- Have a consultant contact you

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

Pick Your Investments

3

Choose a Mangaged Portfolio
A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

3

Choose Your Own Mix of Funds
Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

+ Investment Objectives	Complete
+ Risk Tolerance	Complete
+ Time Horizon	Complete

1

Your Investment Risk Level

Based on your responses to the questions above, your profile is **Moderately Aggressive**

2

Your Portfolio Options

3Based on your investment objectives, risk tolerance and time horizon, we have identified the right managed portfolio for you.

5

4

Your Suggested Portfolio

ABC Organization 2045 Portfolio

Selected

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

+ SHOW FUNDS

7

View Portfolio Disclosure

6

Choose this Portfolio

- 8
- + View other Lifecycle portfolio options
- 9
- + View other Lifestyle portfolio options

Important Information

Certain mutual funds require a holding period specified in the fund’s prospectus and may impose [redemption fees](#) on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

1.2.1 Portfolio Options

- 1 Change Header and paragraph copy
- 2 Remove meter image: keep border / divider line.
- 3 Remove [] around “Mangaged”
- 4 Change Suggested Portfolio to Green
- 5 Replace Star icon: image provided in seperate file.
- 6 Change button to stylized radio button: selected state style
- 7 Add link to Custom Portfolio Disclosure
- 8 Change Style to accordion
- 9 Add Additional accordion: see 1.2.2 Portfolio Options - Other Portfolios

My TIAA-CREF

My Accounts
Manage My Portfolio
My Profile

Advice & Planning

Advice
Learning Center
Insights & Outcomes
Web Seminars
Tools & Calculators
Publications
Video

Products & Services

Retirement Plans
IRAs
Mutual Funds
After-Tax Annuities
Life Insurance
Brokerage Services
Managed Accounts
Education Savings
Consultations & Seminars

Research & Performance

Market Research
Retirement Investments
IRAs
Funds - Retail Class
Funds - Institutional Class
After-Tax Annuities
Life Insurance
529 Plans

About TIAA-CREF

Why TIAA-CREF
How We Invest
Pressroom
Careers
Governance
TIAA-CREF Library
Fellowships & Awards

Have a question?

- Talk to us at **800 842-2252**
- Have a consultant contact you

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)

- MY PORTFOLIO ▾
- MANAGE ACCOUNT ▾
- ADVICE & GUIDANCE ▾
- PRODUCTS & SERVICES ▾
- RESEARCH & PERFORMANCE ▾

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

Pick Your Investments

Choose a Mangaged Portfolio
A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds
Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

+ Investment Objectives	✓ Complete
+ Risk Tolerance	✓ Complete
+ Time Horizon	✓ Complete

Your Investment Risk Level

Based on your responses to the questions above, your profile is **Moderately Aggressive**

Your Portfolio Options

Based on your investment objectives, risk tolerance and time horizon, we have identified the right managed portfolio for you.

★ Your Suggested Portfolio

ABC Organization 2045 Portfolio

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[+ SHOW FUNDS](#)

[View Portfolio Disclosure](#)

5 ☐ Choose this Portfolio

- 1 - View other Lifecycle portfolio options
- 2 + ABC Organization 2015 Portfolio 3 ✓ Selected
- + ABC Organization 2025 Portfolio
- 4 + View other Lifestyle portfolio options

Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose [redemption fees](#) on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

1.2.2 Portfolio Options - Other Portfolios

- 1 “Other Lifecycle Portfolios” Accordion: when expanded this will present an embedded table for each available Lifecycle Custom Portfolio (excluding the suggested portfolio.
- 2 Embedded table: when expanded it will present a custom portfolio in the parent category.
- 3 “Selected” portfolio: Appears in embedded table header when selected
- 4 “Other Lifestyle Portfolios” Accordion: when expanded this will present an embedded table for each available Lifestyle Custom Portfolio (excluding the suggested portfolio.
- 5 Unselected stylized radio button: unselected state style

My TIAA-CREF

My Accounts

Manage My Portfolio

My Profile

Advice & Planning

Advice

Learning Center

Insights & Outcomes

Web Seminars

Tools & Calculators

Publications

Video

Products & Services

Retirement Plans

IRAs

Mutual Funds

After-Tax Annuities

Life Insurance

Brokerage Services

Managed Accounts

Education Savings

Consultations & Seminars

Research & Performance

Market Research

Retirement Investments

IRAs

Funds - Retail Class

Funds - Institutional Class

After-Tax Annuities

Life Insurance

529 Plans

About TIAA-CREF

Why TIAA-CREF

How We Invest

Pressroom

Careers

Governance

TIAA-CREF Library

Fellowships & Awards

Have a question?

▪ Talk to us at **800 842-2252**

▪ Have a consultant contact you

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)



Financial Services

- MY PORTFOLIO
- MANAGE ACCOUNT
- ADVICE & GUIDANCE
- PRODUCTS & SERVICES
- RESEARCH & PERFORMANCE

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

Current Elections by Asset Class

Pick Your Investments

Choose a Mangaged Portfolio

A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds

Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

Investment Objectives	Complete
Risk Tolerance	Complete
Time Horizon	Complete

Your Investment Risk Level

Based on your responses to the questions above, your profile is **Moderately Aggressive**

Your Portfolio Options

Based on your investment objectives, risk tolerance and time horizon, we have identified the right managed portfolio for you.

Your Suggested Portfolio

ABC Organization 2045 Portfolio

Selected

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[+ SHOW FUNDS](#)

View Portfolio Disclosure

Choose this Portfolio

View other Lifecycle portfolio options

1

ABC Organization 2015 Portfolio

View: Portfolio Allocation | Performance

2

3

ABC Organization 2045

3

View Portfolio Disclosure

4

Choose this Portfolio

ABC Organization 2025 Portfolio

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[+ SHOW FUNDS](#)

View Portfolio Disclosure

Choose this Portfolio

View other Lifestyle portfolio options

Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose **redemption fees** on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

My TIAA-CREF

- My Accounts
- Manage My Portfolio
- My Profile

Advice & Planning

- Advice
- Learning Center
- Insights & Outcomes
- Web Seminars
- Tools & Calculators
- Publications
- Video

Products & Services

- Retirement Plans
- IRAs
- Mutual Funds
- After-Tax Annuities
- Life Insurance
- Brokerage Services
- Managed Accounts
- Education Savings
- Consultations & Seminars

Research & Performance

- Market Research
- Retirement Investments
- IRAs
- Funds - Retail Class
- Funds - Institutional Class
- After-Tax Annuities
- Life Insurance
- 529 Plans

About TIAA-CREF

- Why TIAA-CREF
- How We Invest
- Pressroom
- Careers
- Governance
- TIAA-CREF Library
- Fellowships & Awards

Have a question?

- Talk to us at **800 842-2252**
- Have a consultant contact you

Connect

Saving Simplifier
TIAA-CREF iPhone™ App.
[Learn More](#)

1.2.2 Portfolio Options - Other Lifecycle Portfolios Opened

- “Other Lifecycle Portfolios” Module:** display all other Lifecylce Portfolios in the embedded sub table of the Other Lifecycle Portfolio Accordion.
- Restyle table:** Maintain indention; remove inner shadow, change back ground to white; table header background to with a dotted seperated line or bottom border that does not span the entire with of the container
- Performance tab Growth Line Chart:** There was a mention that benchmarks are not possible so remove the benchmarks.
- Unselected Stylized radio button:** unselected state style

SECURITY | ONLINE PRIVACY | TERMS & CONDITIONS | PROSPECTUSES | BUSINESS CONTINUITY

© 2013 and prior years, Teachers Insurance and Annuity Association - College Retirement Equities Fund (TIAA-CREF), New York, NY 10017

TIAA
CREF

Financial Services

TONY KRAFT | last login 07/31/2013 | PROFILE & SETTINGS | MESSAGES 3 | CONTACT US | LOG OUT

MY PORTFOLIO | MANAGE ACCOUNT | ADVICE & GUIDANCE | PRODUCTS & SERVICES | RESEARCH & PERFORMANCE

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

Current Elections by Asset Class

Pick Your Investments

Choose a Managed Portfolio

A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

Choose Your Own Mix of Funds

Review a list of all available investment options and create your own mix.

Your Investment Profile

Let us ask you a few questions so we can craft a portfolio for you.

Investment Objectives

Risk Tolerance

Time Horizon

Complete

Complete

Complete

Your Investment Risk Level

Based on your responses to the questions above, your profile is **Moderately Aggressive**

Your Portfolio Options

Based on your investment objectives, risk tolerance and time horizon, we have identified the right managed portfolio for you.

Your Suggested Portfolio

ABC Organization 2045 Portfolio

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[View Portfolio Disclosure](#)

☐ Choose this Portfolio

View other Lifecycle portfolio options

View other Lifestyle portfolio options

1 + ABC Organization Portfolio - Conservative

2 ✓ Selected

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[View Portfolio Disclosure](#)

3

☒ Choose this Portfolio

+ ABC Organization Portfolio - Moderate

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[View Portfolio Disclosure](#)

☐ Choose this Portfolio

+ ABC Organization Portfolio - Aggressive

View: Portfolio Allocation | Performance

GUARANTEED	13%
EQUITIES	30%
REAL ESTATE	21%
FIXED INCOME	10%
MONEY MARKET	12%
MULTI-ASSET	9%

[View Portfolio Disclosure](#)

☐ Choose this Portfolio

Back

Preview Changes

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and may impose **redemption fees** on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

1.2.2 Portfolio Options - Other Lifestyle Portfolios Opened

1 “Other Lifestyle Portfolios” Module: display all other Lifestyle Portfolios in the embedded sub table of the Other Lifestyle Portfolio Accordion. Maintain Other Portfolio styling.

2 Selected Lifestyle Portfolio Module: “select” check mark should appear in header.

3 Selected stylized radio button: selected state style

My TIAA-CREF

My Accounts

Manage My Portfolio

My Profile

Advice & Planning

Advice

Learning Center

Insights & Outcomes

Web Seminars

Tools & Calculators

Publications

Video

Products & Services

Retirement Plans

IRAs

Mutual Funds

After-Tax Annuities

Life Insurance

Brokerage Services

Managed Accounts

Education Savings

Consultations & Seminars

Research & Performance

Market Research

Retirement Investments

IRAs

Funds - Retail Class

Funds - Institutional Class

After-Tax Annuities

Life Insurance

529 Plans

About TIAA-CREF

Why TIAA-CREF

How We Invest

Pressroom

Careers

Governance

TIAA-CREF Library

Fellowships & Awards

Have a question?

Talk to us at 800 842-2252

Have a consultant contact you

Connect

f in t

Saving Simplifier TIAA-CREF iPhone™ App. Learn More

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

Note: You have pending transactions that must be cancelled before subscribing to your Custom Portfolio.

Submitted via RETIREMENT ADVISOR

EFFECTIVE DATE	PLAN NAME	TRANSACTION	DETAILS			
5/1/2013	TIAA-CREF ROTH IRA <div>TIAA NE143445 (closed) TIAA NE143440 (open) CREF TE143445 Plan Number: IRA201</div>	Allocation	CREF Equity Index		40%	
			TIAA-CREF Lifecycle 2045 Fund - Retirement Class		35%	
			CREF Social Choice		21%	
			CREF Money Market		4%	
5/1/2013	University ABC 403(b) Deferred Retirement Plan <div>TIAA V6782433 CREF W948576 Plan Number: 10043</div>	Allocation	CREF Global Equities		20%	
			CREF Access Large-Cap Value Index		20%	
			CREF Social Choice		20%	
			Wells Fargo Stable Return Fund		20%	
			CREF Bond Market		10%	
			CREF Money Market		10%	
5/1/2013	TIAA-CREF ROTH IRA <div>TIAA NE143445 (closed) TIAA NE143440 (open) CREF TE143445 Plan Number: IRA201</div>	Investment Change	SOURCE FUND(S)		DESTINATION FUND(S)	
			TIAA Traditional	50%	TIAA-CREF Lifecycle 2030 Fund - Retirement Class	50%
					TIAA-CREF Lifecycle 2045 Fund - Retirement Class	50%
5/1/2013	University ABC 403(b) Deferred Retirement Plan <div>TIAA V6782433 CREF W948576 Plan Number: 10043</div>	Transfer	SOURCE FUND(S)		DESTINATION FUND(S)	
			TIAA Real Estate	100%	CREF Bond Market	50%
					TIAA-CREF Lifecycle 2045 Fund - Retirement Class	50%
6/15/2013	University ABC 403(b) Deferred Retirement Plan <div>TIAA V6782433 CREF W948576 Plan Number: 10043</div>	Investment Change	SOURCE FUND(S)		DESTINATION FUND(S)	
			TIAA Traditional	100%	TIAA-CREF Social Choice	50%
					Vanguard Target 2045 Fund	50%
6/15/2013	TIAA-CREF ROTH IRA <div>TIAA NE143445 (closed) TIAA NE143440 (open) CREF TE143445 Plan Number: IRA201</div>	Allocation	TIAA-CREF Lifecycle 2030 Fund - Retirement Class		25%	
			TIAA-CREF Lifecycle 2045 Fund - Retirement Class		25%	
			TIAA-CREF Social Choice		25%	
			CREF Global Equity		25%	
11/14/2013	University ABC 403(b) Deferred Retirement Plan <div>TIAA V6782433 CREF W948576 Plan Number: 10043</div>	Annual Rebalance	CREF Equity Index		40%	
			TIAA-CREF Lifecycle 2045 Fund - Retirement Class		35%	
			CREF Social Choice		21%	
			CREF Money Market		4%	

Submitted via Participant via Web

EFFECTIVE DATE	PLAN NAME	TRANSACTION	DETAILS			
5/1/2013	TIAA-CREF Traditional IRA <div>TIAA NE143440 CREF TE143445 Plan Number: IRA201</div>	Investment Change	SOURCE FUND(S)		DESTINATION FUND(S)	
			TIAA-CREF Lifecycle 2035 Fund - Retirement Class	100%	TIAA-CREF Lifecycle 2030 Fund - Retirement Class	100%

Back

Exit Without Saving

Cancel Pending Transactions

Important Information
Certain mutual funds require a holding period specified in the fund's prospectus and impose **redemption fees** on the account redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

1.3.0 Pending Transaction Conditional page

- 1

H1 change. Consistent with ART flow and the rest of the custom portfolio flow.
- 2

“Exit without saving” button : Allows user to exit / cancel and without saving subscription to custom portfolio and allowing any pending transactions to continue processing.
- 3

“Cancel Pending Transaction” button : change button label



Financial Services

Quote: Symbol or Company Name

Open an Account

- My Portfolio
- Manage Accounts
- Advice & Guidance
- Products & Services
- Research & Performance

Manage My Portfolio > Change Allocation of Future Contributions

Change Allocation of Future Contributions

PRINT

Please review your selection below and then select **Submit** to process your Custom Portfolio request.

Preview Changes

ABC ORGANIZATION RETIREMENT PLAN

GSRA (TIAA V6782433) (CREF W948576)

Plan Number: 10043

Custom Portfolio: **ABC Organization 2040 Portfolio**

View: Portfolio Allocation | Performance



GUARANTEED	13%
TIAA Traditional	30%
EQUITIES	30%
American Funds Washington Mutual Investors Fund R3	3%
TIAA-CREF Equity Index	2%
CREF Global Equities	2%
CREF Growth	2%
TIAA-CREF Growth & Income	1%
REAL ESTATE	21%
TIAA Real Estate	10%
FIXED INCOME	10%
CREF Bond Market	10%
TIAA-CREF Bond	15%
MONEY MARKET	12%
CREF Money Market	4%
Vanguard Prime Money Market Fund Institutional	1%
MULTI-ASSET	9%
TIAA-CREF Lifecycle 2035	20%

Effective Date: 5/26/2013

I understand that [insert specific legal terms and conditions].

☐ I agree with the above statements and want to submit my enrollment.

Back

Cancel

Submit

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and impose **redemption fees** on the account redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

My Portfolio

360° Financial View

Profile & Settings

Manage Accounts

Statement & Reports

Advice & Guidance

Investment Advice

Products & Services

Open An Account

Research & Performance

Research Investments

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[LEARN MORE](#)

1.4.0 Confirmation page

- H1 change.** Consistent with ART flow and the rest of the custom portfolio flow.
- Change “Back” link to button and move to the left.**
- Change “Cancel” button to link**



Financial Services

Quote:

[Open an Account](#)

- [My Portfolio](#) ▾
- [Manage Accounts](#) ▾
- [Advice & Guidance](#) ▾
- [Products & Services](#) ▾
- [Research & Performance](#) ▾

Manage My Portfolio > Change Allocation of Future Contributions

Thank you. Your allocation changes have been submitted.

PRINT

Your request to change investments has been submitted and you will receive a confirmation statement shortly.

Request Submitted

ABC ORGANIZATION RETIREMENT PLAN

GSRA (TIAA V6782433) (CREF W948576)

Plan Number: 10043

Custom Portfolio: **ABC Organization 2040 Portfolio**

View: [Portfolio Allocation](#) | [Performance](#)



GUARANTEED	13%
TIAA Traditional	30%
EQUITIES	30%
American Funds Washington Mutual Investors Fund R3	3%
TIAA-CREF Equity Index	2%
CREF Global Equities	2%
CREF Growth	2%
TIAA-CREF Growth & Income	1%
REAL ESTATE	21%
TIAA Real Estate	10%
FIXED INCOME	10%
CREF Bond Market	10%
TIAA-CREF Bond	15%
MONEY MARKET	12%
CREF Money Market	4%
Vanguard Prime Money Market Fund Institutional	1%
MULTI-ASSET	9%
TIAA-CREF Lifecycle 2035	20%

Effective Date: 5/26/2013

Other Actions

- Change future contributions on another plan
- Return to Account Home

Important Information

Certain mutual funds require a holding period specified in the fund's prospectus and impose **redemption fees** on the account redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

My Portfolio

360° Financial View

Profile & Settings

Manage Accounts

Statement & Reports

Advice & Guidance

Investment Advice

Products & Services

Open An Account

Research & Performance

Research Investments

Connect



Saving Simplifier
TIAA-CREF iPhone™ App.
[LEARN MORE](#)

- [SECURITY](#)
- [ONLINE PRIVACY](#)
- [TERMS & CONDITIONS](#)
- [WEB ACCESSIBILITY](#)
- [PROSPECTUSES](#)

Investment, insurance and annuity products are not FDIC insured, are not bank guaranteed, are not deposits, are not insured by any federal government agency, are not a condition to any banking service or activity, and may lose value.

TIAA-CREF Individual & Institutional Services, LLC and Teachers Personal Investors Services, Inc., members FINRA, distribute securities products. Annuity contracts and certificates are issued by Teachers Insurance and Annuity Association (TIAA) and College Retirement Equities Fund (CREF), New York, NY.

© 2012 and prior years, Teachers Insurance and Annuity Association - College Retirement Equities Fund (TIAA-CREF), New York, NY 10017

1.4.0 Success page

- H1 change.** Consistent with ART flow and the rest of the custom portfolio flow.
- Change Change callout header from h1 styling to h2 styling**
- Remove arrows**

Change Allocation of Future Contributions

You have two options for setting up allocations of future contributions. You have access to custom-tailored portfolios when you take a retirement goals assessment, or you can choose your own mix of funds.

+ Current Elections by Asset Class

1

Choose a Mangaged Portfolio
A professionally managed portfolio offering broad asset class diversification and automatic rebalancing to keep you on track.

1

Choose Your Own Mix of Funds
Review a list of all available investment options and create your own mix.

2

Your Investment Profile

3

When you first signed up for a Managed Portfolio, you answered a questionnaire in order to identify a portfolio that matched your retirement strategy and objectives. Please review your previous answers below, make any necessary changes and click the View Portfolio Options to select a new portfolio.

Investment Objectives

Complete

I am saving for **retirement** | edit

I am seeking **income and captial preservation** | edit

I consider myself **a beginner or novice with little or no investment experience** | edit

Risk Tolerance

Complete

Portfolio 1, which is most likely to exceed long-term inflation by a **significant margin** and has a **high degree of risk** most closely reflects my investment philosophy. | edit

If I invested \$100,000, I'd be most combortable with my investment **growing to \$104,000**, but with a **16% chance of losing money** over a 1-year period | edit

I want to **protect the value of your account, recognizing that if you want to minimize the chance of loss, you must be willing to accept the lower long-term returns from conservative investments** | edit

If I was 10 years from retirement and my portfolio fell 20% in a short period of time, I would **do nothing**. | edit

I prefer to hold **Portfolio A which may gain up to 46% and lose up to 27%** over a 1-year period | edit

I **agree** with the following statement: "I am comfortable with investments that may frequently experience large declines in value, if there is a potential for higher returns." | edit

Time Horizon

Complete

I plan to make my first withdrawal in **less than 1 year**. | edit

I expect my withdrawals to last **over 1 to 4 years**. | edit

Your Investment Risk Level

Based on your responses to the questions above, your profile is **Moderately Aggressive**

4

View Portfolio Options

Back

Preview Changes

Important Information
Certain mutual funds require a holding period specified in the fund's prospectus and may impose **redemption fees** on the amount redeemed or exchanged out of the fund during the holding period, following the initial purchase date.

Distributions from 403(b) plans before age 59½, severance from employment, death, or disability may be prohibited, limited, and/or subject to substantial tax penalties. Different restrictions may apply to other types of plans.

C4215

2.0.0 Choose a different portfolio

- 1 Update copy and tab labels
- 2 Move header above the copy
- 3 Change Custom Portfolio to Managed Portfolio
- 4 Add “View Portfolio Options” button: regenerates suggested and available portfolios based on the answers to the questionnaire, whether questionnaire answers were edited or not. Do not show suggested portfolio module if that module is currently the “Current Election”s