TIAA Individual Advisory Services

Getting you to and through retirement

Your financial needs are unlike anyone else's, so it only makes sense that your financial plan would cater to your specific needs and goals. In order to do that, advisors at TIAA spend a lot of time listening and asking questions to understand your financial needs and your vision of the future.

Based on the discussion, advisors design specialized solutions to address your financial planning needs by collaborating with a team of seasoned professionals in the following areas:

Retirement income

Banking

Brokerage services

Tax

Estate planning

Charitable giving

Investments

Life insurance

Services from Individual Advisory Services

We provide information and recommendations in the following areas:

- Retirement planning
- Investment management and planning
- Estate planning
- Charitable planning
- Education planning
- Retirement income projection
- Personalized action plan
- 360° Financial Review
- Asset protection planning
- Investment strategy review
- Benefits analysis
- Life insurance analysis
- Brokerage services
- Thought leadership content
- Webinars and seminars
- Trust services

Who do we serve?

Individual Advisory Services serves individuals whose asset levels have made their financial decisions complex or whose circumstances require highly specialized financial solutions with a detailed level of personalized service.

What can you expect from us?

Your advisory team will:

- Listen to your financial needs and evaluate your assets, liabilities, income and expenses to get a complete understanding of your financial circumstances.
- Assess your short- and long-term financial objectives taking into account your risk tolerance, time horizon and other planning needs.
- Provide specific investment recommendations, after consulting with a team of specialists in estate planning, taxation and asset management as determined by the situation. This recommendation includes an asset allocation designed for your personal goals.
- Implement your chosen strategy using an efficient approach to help minimize investment expenses.
- Review your progress and provide dedicated ongoing support, advice and education to adjust your plan as needs change.
- Send educational content that is pertinent to your specific situation, including invitations to in-person educational seminars.

Let's get started

If you would like to learn more about Individual Advisory Services, call **866-220-6583**.

TIAA.org/individualadvisoryservices

TIAA Mobile App

TIAA

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Individual Advisory Services

TIAA

Your dedicated Individual Advisory Services team contact information

Don't forget. You can visit TIAA.org anytime to access your account and stay connected.

405 564-7406

Emily.Mcpherson@tiaa.org

EMILY MCPHERSON

Wealth Management Advisor

EMILY is the primary advisor for your financial planning and advisory-related needs. Your advisor will work with you one-on-one to understand your goals and build tailored solutions to help address your investment and estate planning challenges.

800 842-2009 Ext. 24-2198

JHahn@tiaa.org

JOEL HAHN

Client Relationship Consultant

Your Client Relationship Consultant is your contact for all day-to-day operational and service-related requests, as well as general account inquiries. Your consultant is thoroughly knowledgeable regarding common client needs and provides consultative assistance on detailed account features and benefits. This includes requests related to contributions, withdrawals, beneficiary designations, required minimum distributions, forms, tracking of incoming assets and asset consolidation, general fund and product information, as well as income illustration requests and all service-related concerns.

405 241-3215

Andrea.Legleiter@tiaa.org

ANDREA LEGLEITER

Administrative Assistant

Your advisory team's Administrative Assistant provides administrative support for your local advisory office and can help you schedule appointments with your advisor.

800 842-2009 Ext. 24-2516

bsamson@tiaa.org

BRIAN SAMSON

Dir, Wealth Management

866 220-6583

Weekdays, 8 a.m. to 10 p.m. (ET)

Saturday, 9 a.m. to 6 p.m. (ET)

Individual Advisory Contact Center

Your contact for service-related issues, general account questions, questions regarding online accounts, and transactional activities regarding transfers, allocation changes and distribution requests.

Dedicated advisory team contact information

TIAA

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405 564-7407

Sariah.Tolsma@tiaa.org

SARIAH TOLSMA

Wealth Management Advisor (T)

800 842-2009 Ext. 24-2198

JHahn@tiaa.org

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