

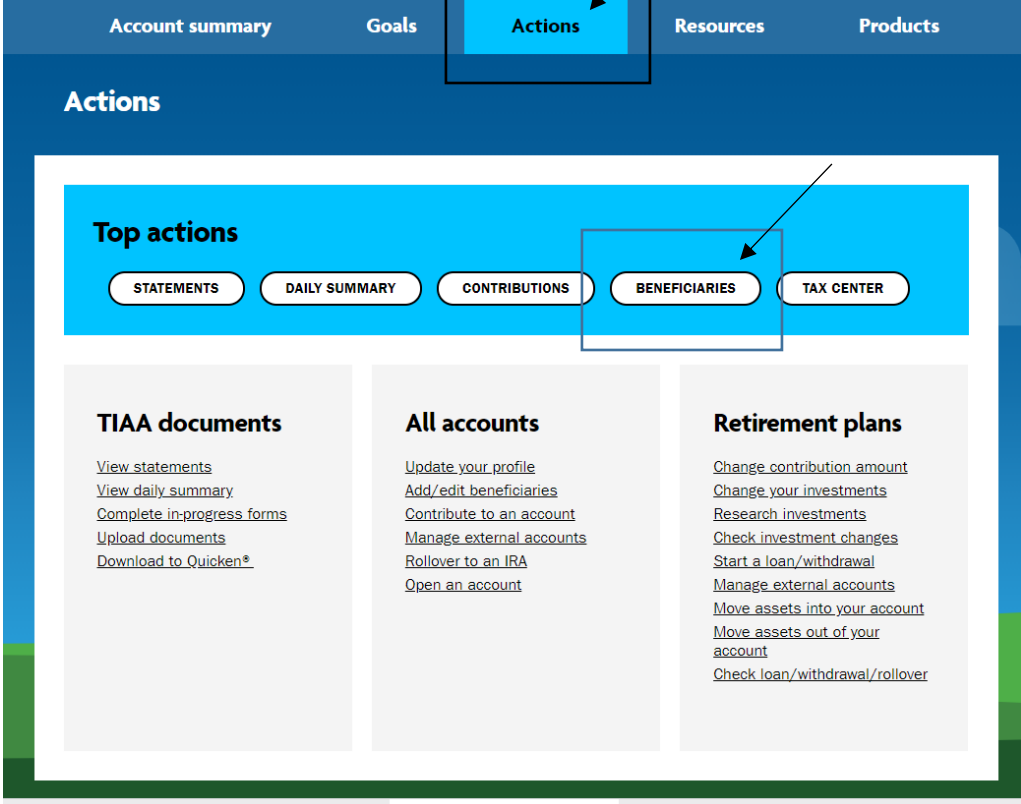
TIAA – Add or Change Retirement Plan Beneficiary

The guide walks you through how to add or change a beneficiary for your retirement plan in the TIAA portal.

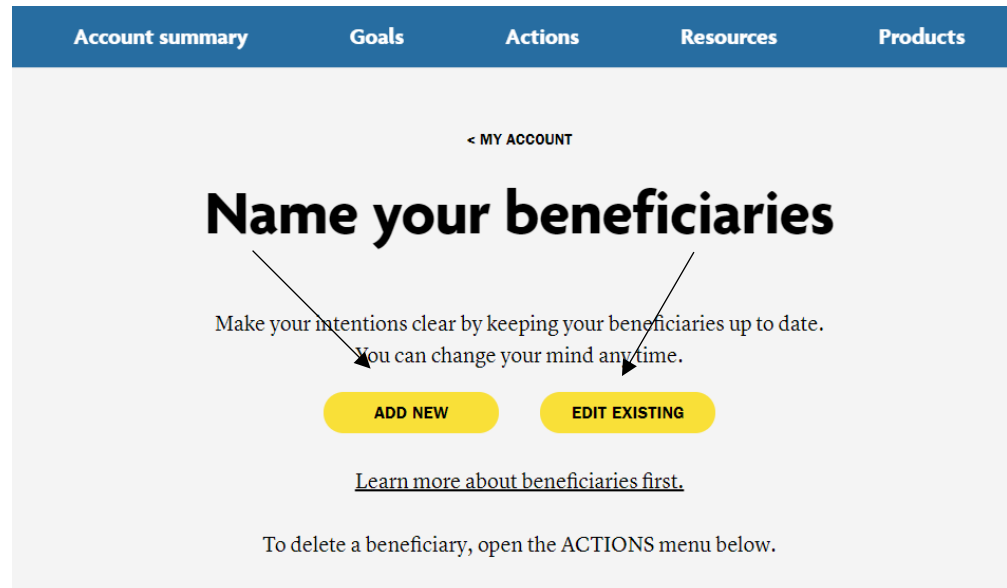
Walkthroughs:

- 1.0 Navigation Path

Audience: All

Process Step & Description	Action
<p>1.0 Navigation Path</p>	<p>Getting Started</p> <ul style="list-style-type: none"> • Navigation Path – Sign in to your account: https://www.tiaa.org/public/ • Click “Actions”, then “Beneficiaries”  <p>The screenshot shows the TIAA portal interface. At the top, there is a navigation bar with tabs: Account summary, Goals, Actions, Resources, and Products. The 'Actions' tab is highlighted in blue. Below this, there is a section titled 'Actions' with a sub-section 'Top actions' containing five buttons: STATEMENTS, DAILY SUMMARY, CONTRIBUTIONS, BENEFICIARIES, and TAX CENTER. The 'BENEFICIARIES' button is highlighted in blue. Below the 'Top actions' section, there are three columns of links: 'TIAA documents' (View statements, View daily summary, Complete in-progress forms, Upload documents, Download to Quicken*), 'All accounts' (Update your profile, Add/edit beneficiaries, Contribute to an account, Manage external accounts, Rollover to an IRA, Open an account), and 'Retirement plans' (Change contribution amount, Change your investments, Research investments, Check investment changes, Start a loan/withdrawal, Manage external accounts, Move assets into your account, Move assets out of your account, Check loan/withdrawal/rollover).</p>

- Click either “ADD NEW” or “EDIT EXISTING”
- You will need to add or edit beneficiaries for all the plans you have within TIAA’s website.
- In order to add or change a beneficiary, you will need contact information include DOB and SSN.



Account summary Goals Actions Resources Products

< MY ACCOUNT

Name your beneficiaries

Make your intentions clear by keeping your beneficiaries up to date.
You can change your mind anytime.

[ADD NEW](#) [EDIT EXISTING](#)

[Learn more about beneficiaries first.](#)

To delete a beneficiary, open the ACTIONS menu below.