



Sole recordkeeper solution

The power of one



By listening to the challenges and needs of the institutions we serve, we continually enhance our services and technologies with the goal of helping you operate your plan more efficiently; making administration and governance easier for you, and helping your employees prepare for retirement.

Today’s plan sponsors must manage their resources carefully while staying focused on providing competitive retirement benefits for employees. As stewards of the assets critical to your employees’ future, it’s important to select a retirement plan model that offers them the opportunity to achieve their retirement income needs. A sole recordkeeping model delivers a streamlined and simplified experience for sponsors and participants alike.

Experience the advantages of the TIAA sole recordkeeping solution

A TIAA sole recordkeeping solution can simplify your plan management, provide potential cost efficiencies, manage your risk and consider the many benefits of consolidation:

Life is simpler

Dealing with multiple providers can be cumbersome and time consuming—the complexities of plan administration and compliance monitoring increase with the number of vendors. With a TIAA sole recordkeeper solution, you can streamline operations, improve transparency and potentially reduce costs. With one contact for all plan needs, your organization will receive a single set of processes and administrative communications along with access to key functions through a single website, helping to make plan management easier and potentially more cost effective.

With the need for manual aggregation and information gaps eliminated, and more transparent view of your plan health, your organization can enjoy ease of administration and more informed decision making.

The power of one

From: Multivendor	To: TIAA sole recordkeeper solution
Multiple procedures, data sources and reporting to aggregate	▶ Single process, data source and centralized, comprehensive reporting
Multiple investment providers to oversee	▶ A single investment menu enabling greater transparency and investment oversight all on one platform
Variety of provider enrollment and education practices	▶ Centralized, coordinated and consistent employee outreach, with TIAA's education and personalized advice services
Generally higher infrastructure cost and resource requirements	▶ Potentially lower cost and resource requirements, greater purchasing power

Improved management

As a plan sponsor, you must be vigilant about your administrative responsibilities. Centrally managed administration through TIAA may reduce your risk with proactive compliance monitoring, comprehensive, single-source reporting and improved investment oversight with open architecture, all on TIAA's platform. At TIAA, we will use our in-depth knowledge of the nonprofit landscape to help keep you ahead of changes in the regulatory environment and focused on best practices. Our full suite of dedicated compliance resources can help your organization meet its regulatory responsibilities, and TIAA's comprehensive fee disclosure support makes fees fully transparent to you and your employees.

Enhanced participant experience

When your employees can experience all aspects of your plan through a single source, generally they are more likely to understand how all the pieces fit together and take action. A single provider with a comprehensive view of all your plan and participant data can work with you to more effectively assess and target your employees with education and advice, making it easier to take action with one contact through their channel of choice.

The TIAA advantage

With over a century of experience in serving the higher education and the nonprofit community, TIAA is uniquely qualified to serve as your institution's exclusive recordkeeper. We are focused on both accumulation and distribution to help your participants plan for and pursue a satisfying retirement, making the choice to transition to TIAA a responsible decision as a plan steward.

We're ready when you're ready

Some plan sponsors may not be in a position to make the change to a single provider in one step. In that case, a phased approach that enables you to make incremental improvements over time may be best for your organization. When you're ready to make a change, we're ready to help. Contact your relationship manager to learn more.



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