

# Boost efficiency with our administrative services

## Effective plan management—one key to plan success

Four building blocks work together to drive outcomes for you and your employees—plan design, investment solutions, employee engagement and plan management. Each is important. But like many plan sponsors, you're likely spending more time on plan management, tackling tasks you never had to worry about before the regulatory requirements for 403(b) plans changed.

At TIAA, we understand that you need an easier way to meet these responsibilities. We offer three service-level options designed to help you streamline administration, manage fiduciary risk and maximize the value of your plan for employees. Plus, more efficient plan management means you'll have more time to focus on the other activities that help drive plan success.

## Breaking down the service options

Making it easy to get the support you need is important, so we offer three levels of administrative service from which to choose:

**TIAA offers three service-level options. Consider the suite of services best suited to your plan.**



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Deciding on the suite of services that best supports your plan depends on your preferred administrative experience, your ability to provide plan data, the terms of your plan document and your desired participant experience. The chart below shows the level of administrative support available under each option.

Services	TIAA Administrative Suites		
	<div style="text-align: center;"> <span style="font-size: 2em; border: 1px solid black; border-radius: 50%; padding: 2px 6px;">1</span>  <b>Full service</b> </div>	<div style="text-align: center;"> <span style="font-size: 2em; border: 1px solid black; border-radius: 50%; padding: 2px 6px;">2</span>  <b>Supplemental service</b> </div>	<div style="text-align: center;"> <span style="font-size: 2em; border: 1px solid black; border-radius: 50%; padding: 2px 6px;">3</span>  <b>Core service</b> </div>
<b>Online enrollment/ Salary deferral</b>	Basic to complex plan provisions	Basic to moderately complex plan provisions	Basic plan provisions
<b>Eligibility</b>	Calculated by TIAA, based on employee census data provided by the plan sponsor on ongoing census/remittance files	Plan sponsor calculates and sends eligibility dates and status updates to TIAA	Plan sponsor calculates and sends eligibility dates and status updates to TIAA
<b>Contribution calculations</b>	TIAA calculates employer and any mandatory employee contributions based on employee census data provided by the plan sponsor on on-going census/remittance files	Plan sponsor calculates and sends contribution amounts to TIAA	Plan sponsor calculates and sends contribution amounts to TIAA
<b>Contribution limits monitoring</b>	TIAA proactively monitors 402(g), 415(c), 401(a)(17) and 457(b); limits and provides feedback files/reports	TIAA proactively monitors 402(g), 415(c), 401(a)(17) and 457(b) limits and provides feedback files/reports	Reactive monitoring 402(g) and 457(b) reports are provided to the plan sponsor
<b>Auto services</b>	TIAA determines employees eligible for auto enrollment, manages auto increases and provides communications	TIAA determines employees eligible for auto enrollment, manages auto increases and provides communications	TIAA determines employees eligible for auto enrollment, manages auto increases and provides communications
<b>Vesting</b>	TIAA calculates service history, including breaks in service, based on employee census data provided by the plan sponsor	Plan sponsor calculates and sends service history which TIAA uses to calculate vesting percentage	Plan sponsor calculates and sends vested percentages to TIAA




**Take a closer look**

If you'd like to learn more about how a TIAA suite of administrative services can help make your job easier, contact your TIAA relationship manager or call the Administrator Telephone Center at **888-842-7782**, weekdays, 8 a.m. to 8 p.m. (ET).

**Plan data—the driver behind the services**

What's your role? To provide certain plan and participant information based on the administrative service suite you choose. We'll work with you to help develop and maintain a data collection program that fits your institution.

Here's some of the information you'll need to provide:

 <b>Employee</b>	 <b>Employment</b>	 <b>Plan</b>
Employee ID number	Employee type <sup>+</sup>	Plan entry date
Name	Employment status	Contribution amount
Address	Employment date	Contribution source
Work email	HR subarea*	Payroll date
Social Security number	Rehire date	Payroll frequency
Date of birth	Termination date	
Gender		
Marital status		
Annual salary		

<sup>+</sup> Full time, part time

\* Job classification/codes

Other data may be necessary based on service suite selected and plan rules. Contact a TIAA representative to confirm specific data elements for your desired suite of services.



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