Select your new investments for your new account on the TIAA platform

Start at [www.hr.upenn.edu](http://www.hr.upenn.edu) and click the new TIAA.org retirement platform link under the top Retirement Savings Plan Participants heading.

You can also access your new account at [www.hr.upenn.edu/PennRetPlan](http://www.hr.upenn.edu/PennRetPlan)

Click the "logging into TIAA" link in the blue box in the middle of the page.

You will need to enter your PennKey and password to access your new account on the TIAA platform.

From the Accounts homepage, click the plus sign (+) by the Retirement heading, then click the arrow by the plan you’d like to update.

Next, click the new contract to select investments for your future contributions and mutual fund balances. *(All new contracts will have "$0.00" as contributions begin in April 2021.)*

Then, click on the CHANGE INVESTMENTS button at the top of the page.

Click the circle above Choose future investments.

If you currently invest with TIAA you will see three options to choose from.

If you currently invest only with Vanguard Choose future investments will be your only option as your new account will not receive contributions until April, so there are no assets to Exchange or Rebalance at this time.

Click PREVIEW OPTIONS or MAKE CHANGES button to continue to select your new investments.
Choose the account you’d like to update

Click the circle by the account for which you’d like to select new investments.

Click the yellow NEXT button below when done.

Change Allocation of Future Contributions

1. Select Effective Date – *disregard*

This date field is auto-populated. Contributions will not be directed to this account until April, you may disregard this field and continue.

2. Choose Your Funds

Use the filter functionality to learn more and refine your choices by asset class, investment type or Morningstar information.

Click on the name of the option in the list below to view additional investment details and see Morningstar reporting data.

Call **877-736-6738**, weekdays 8 a.m. to 5 p.m. (ET) if you have questions or need assistance navigating. A TIAA consultant can “co-browse” with you and walk you through the process.
2. Choose Your Funds (continued)

Your new account will be fully (100%) directed to the Vanguard Institutional Target Retirement Income Fund aligned with your date of birth. You can change this amount to 0% and select the different investments to build your own portfolio.

Enter your desired percentage amounts in the last column on the right. continue selecting options until your total is 100%.

Click the gold Continue button below after you have finished selecting your investments.

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Review & Submit Changes

Check “I have reviewed my investment changes and I am ready to submit this request.”

Check the box to add eDelivery to your account.

Click the gold Submit button

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View your confirmation information.

Below the confirmation section with the pie chart, click “Change future contributions on another plan” under the Other Actions heading.

This will take you to your list of the Plans. You will see a “Pending” notation under the Plan for which you have just selected investments.

Repeat the same steps to select options for your other plans.

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