



A web experience built with you in mind

Brokerage website overview

Managing your TIAA Brokerage account

A TIAA Brokerage account offers plenty of investment choices for new and experienced investors.

Powerful tools and resources are available to help you build, navigate and monitor your portfolio.

Once logged in, it's easy to get familiar with key features and begin investing.



Questions?

Any time you have questions about your Brokerage account, please contact us at 800-842-2252, weekdays, 8 a.m. to 7 p.m. (ET). We look forward to helping you plan for your financial well-being—now and for many years to come.

See an overview of your account

Your account overview is a snapshot of your portfolio.

The screenshot displays the TIAA Brokerage account overview. At the top, there are navigation buttons for 'TRANSFER MONEY', 'TRADE', and 'QUICK LINKS'. The main header shows account statistics: Total Account Value (\$155,896.98), Day's Change (+\$12.89, +0.01%), Cash to Trade (\$79,664.37), and Buying Power (\$159,328.74). Below this is a navigation bar with tabs for Overview, Investments, Balances, Activity, Order Status, and Research. The 'Overview' section is active, showing account information and a table of top movers. The table lists two securities: IEFA (iShares TR Core Bond) and IEMG (iShares NO Core MSCI Emerging Mkts). Below the table are sections for 'Account value over time' and 'Account movement'.

SECURITY	QTY	MARKET VALUE	TODAY'S GAIN	UNREALIZED GAIN/LOSS	TRADE
IEFA iSHARES TR CORE BOND	24,7793	\$15,787.43	+\$71.03 (+0.45%)	+\$1,514.91 (+10.63%)	TRADE
IEMG iSHARES NO CORE MSCI EMERGING MKTS	258,5557	\$12,459.80	+\$46.54 (+0.38%)	+\$137.20 (+1.11%)	TRADE

Here, you can view performance over time, as well as your top movers. If you'd like, you can even make a trade right from this page.

Quickly review recent account activities or check the status of your orders.

View your investments

Under the *Investments* tab you can view all of your CURRENT HOLDINGS. See how your investments have been performing today or since your purchase.

The screenshot displays the TIAA Brokerage website interface. At the top, there are navigation buttons for 'TRANSFER MONEY', 'TRADE', and 'QUICK LINKS'. Below this, a summary bar shows account metrics: Total Account Value (\$155,896.98), Day's Change (+\$12.89, +0.01%), Cash to Trade (\$79,664.37), and Buying Power (\$159,328.74). The main navigation includes 'OVERVIEW', 'INVESTMENTS', 'BALANCES', 'ACTIVITY', 'ORDER STATUS', and 'RESEARCH'. The 'Investments' section is active, showing a table of current holdings. The first holding is AAPL (Apple Inc. Common Stock) with a market value of \$1,512.98, a market price of \$152.72, and a quantity of 10.108. It shows an unrealized gain of \$320.14 (+26.18%) and a today's gain/loss of \$11.37 (+0.74%). Below the table, there are sections for 'Holding summary' (Security type: CS/SIP, Disposition method: First In, First Out, Type: Margin, Purchase cost: \$1,222.84, Purchase price: \$121.04) and 'Reinvestment settings' (Dividend setting: Reinvest, Capital gain setting: N/A). The second holding, AMZN (Amazon.com), is partially visible with a market value of \$1,307.00, a market price of \$93.40, and a quantity of 14.00. It shows an unrealized loss of \$659.40 (-53.92%) and a today's loss of \$2.10 (-0.13%).

SECURITY	MARKET VALUE	MARKET PRICE	QUANTITY	UNREALIZED GAIN/LOSS	TODAY'S GAIN/LOSS
AAPL APPLE INC. COM	\$1,512.98	\$152.72	10.108	+\$320.14 (+26.18%)	+\$11.37 (+0.74%)
Holding summary		Reinvestment settings		ACTIONS	
Security type:	CS/SIP	Stock	Dividend setting:	Reinvest	
Disposition method:	First In, First Out	Q37823100	Capital gain setting:	N/A	
Type:	Margin				
Purchase cost:	\$1,222.84				
Purchase price:	\$121.04				
AMZN AMAZON.COM	\$1,307.00	\$93.40	14.00	-\$659.40 (-53.92%)	-\$2.10 (-0.13%)

Expand to see more details about your reinvestment settings and tax lot disposition method or order in which your shares will be sold.

If you're curious about the net value or unrealized gain/loss of an investment, important cost basis information is available.

And you can drill down into a specific investment to make a trade.

Get your account balances

Select the *Balances* tab and you'll never wonder what you have available for trading or withdrawals.

TIAA Brokerage TRANSFER MONEY TRADE QUICK LINKS

TOTAL ACCOUNT VALUE **\$155,896.98** **DAY'S CHANGE** **+\$12.89 (+0.01%)** **CASH TO TRADE** **\$79,664.37** **BUYING POWER** **\$159,328.74**

Real-time as of 03/08/2023 12:25 PM (ET)

OVERVIEW **INVESTMENTS** **BALANCES** **ACTIVITY** **OPEN STATUS** **RESEARCH**

Balance summary

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TOTAL ACCOUNT VALUE	\$155,896.98	Total Market Value	\$155,839.20
PREVIOUS CLOSE	\$155,884.00	Cash Management Fee ¹	\$57.78
CHANGE	+\$12.89 (+0.01%)	Local Equity Percent	100%
		Unsettled Trades	\$0.00

Funds available

Cash Available to Trade ²	\$79,664.37	Cash Available to Withdraw	\$57.78
Margin Available to Trade	\$109,328.74	Cash + Borrowing to Withdraw	\$69,664.37
Day Trading Buying Power ⁴	\$453,209.00	Funds on Hold	-\$10,000.00

[Required Minimum Distribution](#) [Margin Disclosure Statement](#)

Balance history

[Show as a calendar](#) Change view: 1 year [Export](#)

In real time, you can see a detailed summary of how your account's value has changed as well as funds currently available—so you can plan your next move.

Check your activities

Under the *Activity* tab, you can check everything that's happened with your accounts, including deposits, withdrawals and executed trades.

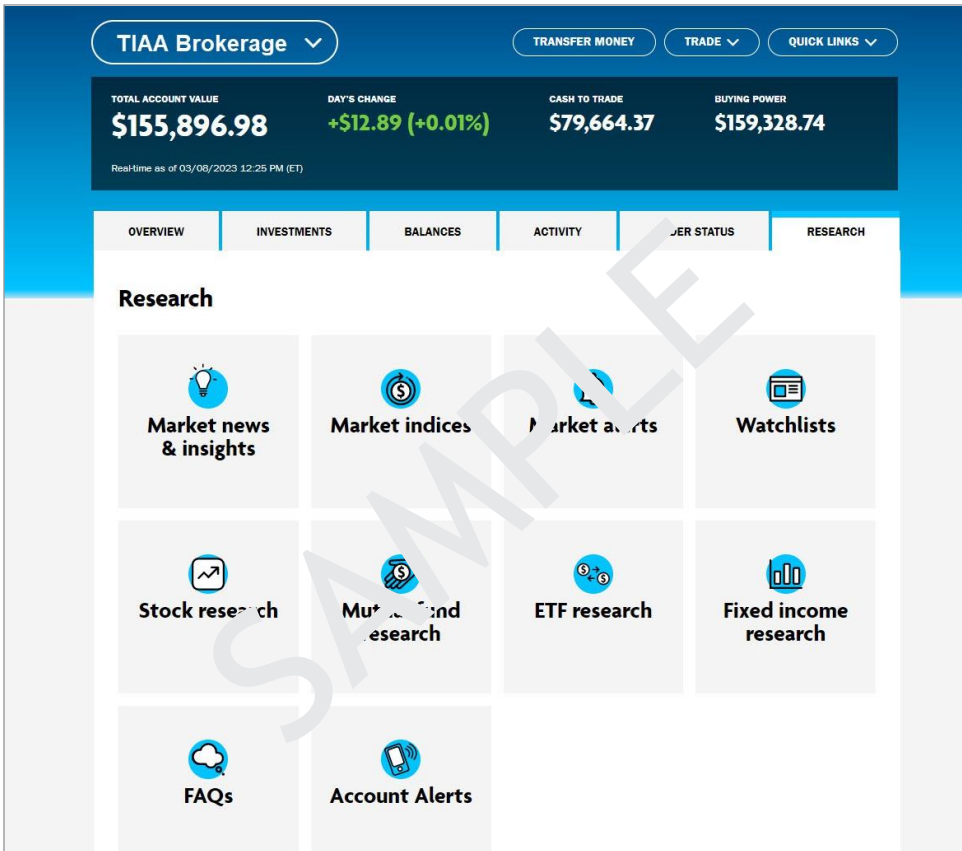
The screenshot displays the TIAA Brokerage account activity page. At the top, there are navigation buttons for 'TRANSFER MONEY', 'TRADE', and 'QUICK LINKS'. Below these, account statistics are shown: TOTAL ACCOUNT VALUE of \$155,896.98, DAY'S CHANGE of +\$12.89 (+0.01%), CASH TO TRADE of \$79,664.37, and BUYING POWER of \$159,328.74. The page is dated RealTime as of 03/08/2023 12:25 PM (ET). The main navigation tabs include OVERVIEW, INVESTMENTS, BALANCES, ACTIVITY (selected), ORDER STATUS, and RESEARCH. The 'Account activity' section has filters for ALL, TRADES, MONEY IN/OUT, and TIME. The 'Since' filter is set to 'This Month' with an 'Export' link. The activity table lists transactions with columns for DATE, ACTIVITY, SYMBOL, DESCRIPTION, TYPE, QUANTITY, and NET AMOUNT.

DATE	ACTIVITY	SYMBOL	DESCRIPTION	TYPE	QUANTITY	NET AMOUNT
03/06/2023	FDIC INSURED BANK		TIAA BROKERAGE SWEEP MMF TBS	Banking		+\$10,099.53
03/03/2023	CASH DIVIDEND RECEIVED		16,6508 SHRS PFIZER INC COM RD 01/27 PD 03/03/23	Income		+\$6.83
03/03/2023	REINVEST CASH DIVIDEND	PFE	PFIZER INC COM PURCHD @ \$40.57000 RD 01/27 PD 03/03/23	Banking	0.1684	-\$6.83
03/02/2023	BUY 10 Shares at \$233.4	IWO	ISHARES TR RUSSELL 2000 GROWTH ETF	Trade	10.00	-\$2,334.00
03/02/2023	BUY 28.0059 Shares at	MRK	MEDCO 8.00 INC-NEW.COM	Trade	28.0059	-\$2,999.07

Filter results according to what's most important to you. You can view ALL, just TRADES or your MONEY that's gone IN and OUT.

Access research tools

The *Research* tab provides market news and tools so you can stay up-to-date on factors that could affect your investments.

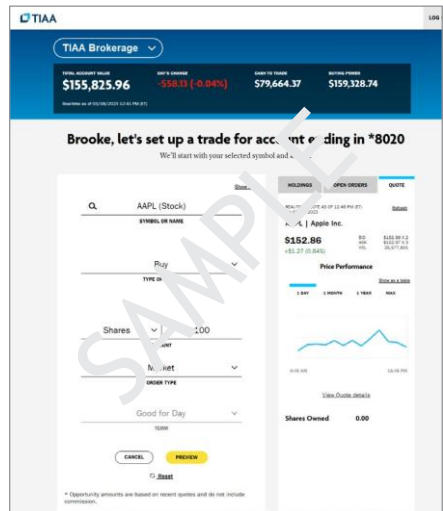
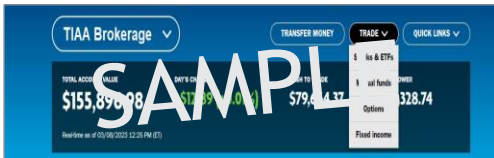


Set account or market alerts to keep track of opportunities to take action. Create watchlists—or even test a hypothetical investment—before you buy.

Everybody has their own investment criteria. Our screening tools help you compare potential investments so you can direct your money according to your goals and values.

Easily place trades

Ready to trade? No matter what page you're on, this drop-down menu gives you quick access.



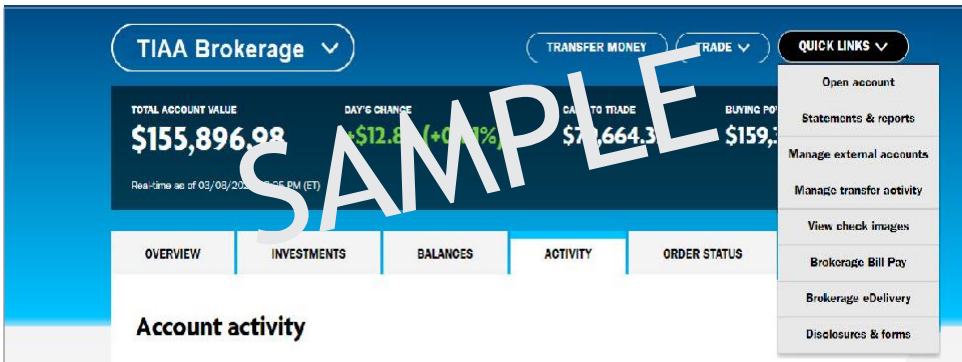
Search by ticker symbol or investment name.

See open orders and positions for stocks, ETFs and mutual funds.

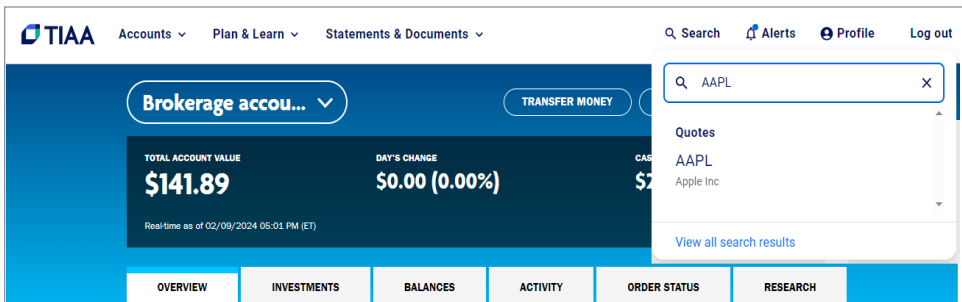
Choose the investment and trade type, and then preview your real-time quote before you confirm.

Navigate your account with ease

To make your experience even more convenient, QUICK LINKS help you get to the things you do most often.



Whether you need to view your statements or reports, or you'd like to check the status of a money transfer—it's all right here.



If you just want a real-time quote, simply type in the ticker symbol or name into the global search bar that's available from any page.

Get started

Within your TIAA Brokerage account, whatever you need is at your fingertips—to help you manage your account and keep pursuing your investment goals.

Ready to get started?

Simply log in to your account at TIAA.org or give us a call if you have any questions.

Log in at TIAA.org

Call us at 800-842-2252, weekdays, 8 a.m. to 7 p.m. (ET).

Get mobile



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