Your TIAA Team

Pat Long

Relationship Manager

Pat is part of the client relationship team responsible for managing the overall client relationship with institutions by leading key initiatives that support and improve the customer experience.

She began her financial services career in 1996 and has been with TIAA since 2009. Pat serves institutional clients in the states of Vermont, Kentucky, Pennsylvania, Georgia, California, New York, Virginia, Maine, Massachusetts, Michigan, New Jersey, South Carolina, Tennessee, and West Virginia, as well as the Washington, D.C. area, from the local Lexington, Kentucky, TIAA office.

Pat holds a B.B.A. from Eastern Kentucky University. She holds FINRA Series 7 and 66 registrations while maintaining life, health and variable annuity licenses from the state of Kentucky.

Brian Munnelly

Senior Director, Financial Consulting

In his role as a Senior Director, Financial Consulting at TIAA, Brian leads a team that helps participants plan for their financial well-being and retirement readiness. Members of his team meet with employees one on one and provide personalized counseling, education and advice, including specific asset allocation and fund selection recommendations based on the plan's investment options.

Brian began his financial services career in 1988 and has been with TIAA since 1991. He serves our healthcare clients from the TIAA NY home office. His team serves the following institutions: Boston Medical Center, Dana-Farber Cancer Institute, Mount Sinai Health System, Jefferson Health, New York University Langone, Cincinnati Children's Hospital System, Nationwide Children's Hospital, Hackensack Meridian Health, and many other healthcare institutions.

Brian earned a B.A. in History from Fordham University. He holds FINRA Series 7, 6, 63 and 24 registrations while maintaining life, health and variable annuity licenses.

Your TIAA Team

Kelli Jordan

Digital Communications Program Manager

In her role as a Digital Communications Program Manager at TIAA, Kelli is responsible for client-facing technology.

Kelli has more than 20 years of financial industry experience and has been with TIAA since 2011.

Prior to her current role, Kelli was a Senior Manager and Communications Consultant. She collaborated with plan sponsors to develop and execute marketing strategies designed to help meet their overall retirement program goals, such as increasing plan participation and helping prepare employees for retirement readiness. Prior to this, Kelli was a Communications Consultant at Fidelity, and a Retirement Plan Specialist at American Century Investments.

Kelli earned a B.S. from the University of Kansas.

Daniel Preston

Transition Manager

In his role as a Transition Manager at TIAA, Dan Preston is responsible for coordinating all aspects of an implementation, including conversions from prior recordkeepers, comprising assets and data, as well as implementing various outsourced administrative services. His goal is to make the transition process run smoothly for plan sponsors and their employees. Dan has access to a team of TIAA professionals to help complete the project in the set time frame.

He has over 25 years of experience in the financial services industry and has been with TIAA since 2015. Dan is located in Charlotte, North Carolina.

He holds a bachelor's degree from the University of North Carolina-Charlotte. Dan holds a FINRA Series 6 registration in the state of North Carolina and the Project Management Professional (PMP) certification.

Your TIAA Team

Walt Melcher

Senior Director, TIAA Financial Solutions

In his role as a Senior Director, Walt collaborates with consultants, plan sponsors and TIAA Relationship Managers, primarily focusing on new plan sponsor relationships in the central United States. He assists plan sponsors seeking to improve their fiduciary oversight, simplify investment menus, reduce service providers or move to a sole recordkeeping solution.

Walt has 30 years of financial services experience and joined TIAA in 2019.

He earned a B.S. and a B.A. from the University of Wisconsin Green-Bay. Walt holds FINRA Series 6, 63 and 66 registrations.

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