

Manifest Support Guide

Manifest is a third-party retirement account rollover service that helps employees easily transfer and consolidate all their old retirement accounts into their current employer sponsored retirement accounts. TIAA has partnered with Manifest to provide a concierge rollover service to active plan participants.

How does Manifest work?

Participants will learn about Manifest from their employers (plan sponsors) and will use Manifest App to initiate a rollover from their old accounts to their active TIAA employer sponsored retirement account.

Manifest will help participants:

Find old accounts

Many participants lose track of where their old retirement accounts are held and may only remember some information. Manifest works with them to locate all their old accounts.

Make the decision to rollover

Manifest answers all participant questions and provides the required guidance for them to make a decision to initiate a rollover.

Provide a concierge rollover service

Manifest then works directly with the source (other) provider to do the necessary paperwork and track the transfer to make the rollover process easier for the participants.

Why is TIAA partnering with Manifest?

We have learned that it is time consuming and confusing for our participants to rollover their old retirement accounts to their active TIAA account. The process involves tedious paperwork and phone calls with the provider who currently holds their inactive accounts. 89% of participants who start the rollover process do not complete it today. By partnering with Manifest, TIAA will be able to provide a high touch concierge service for our participants during the rollover process.

How does this impact the call center?

Manifest will be rolled out on select plans and distributed by the plan sponsor. We do not expect this to have major impact to our customer support process. However, in case we receive questions from our participants about Manifest we want to be prepared. Below are a set of questions we could expect once we launch our partnership.

Manifest Support Guide (cont.)

Anticipated Questions from Participants to TIAA's Call Center

Q: Does TIAA provide access to Manifest?

A: Yes, TIAA has partnered with a third-party rollover service called Manifest. This service can be used free of cost to rollover your old retirement accounts to your active TIAA account.

Q: Can I use Manifest to rollover old accounts into TIAA?

A: Yes, Manifest can help you find your old accounts and provide step by step assistance with the rollover process.

Q: How can I reach Manifest customer support directly?

A: Please log into Manifest App to get immediate chat support or email them at support@usemanifest.com

Any Manifest specific questions should be directed to Manifest support.

For example:

- I forgot my login credentials to Manifest
- I cannot find my old employer when I search in the Manifest employer search screen.
- I initiated my transfer using Manifest, has my old account at Vanguard liquidated?
- I want to unsubscribe to Manifest

TIAA has partnered with Manifest to make rollover easier for you. Please log into the App to get immediate chat support or email them at: support@usemanifest.com.

Contact Manifest if you have any questions and we're happy to assist.