



## **CONSOLIDATE YOUR HOUSEHOLD FINANCES**

Many investors have multiple accounts in their households. For instance, you may have a brokerage account for each member of your family, individual retirement accounts for yourself and for your spouse, and an asset management account to handle your investment, check writing, and MasterCard® debit card needs. Managing all of your accounts can be complicated and time consuming, but SelectLink® can help you get organized and keep track of your combined household finances. With this complimentary service, you can link all of your accounts that share the same mailing address. As a result, SelectLink consolidates all of your household statements, prepares a summary cover page, and mails these documents to you in one package. Note: The Consolidated Statements feature is available for TIAA Brokerage Accounts only.

## **SELECTLINK**

The SelectLink summary enables you to view the net worth of each account, as well as the combined net worth for all of your household accounts. In addition, the SelectLink summary provides the values and percentages of each asset category in your portfolio (for instance, stocks, bonds and mutual funds).

## **A COMPREHENSIVE SUMMARY**

The SelectLink summary page is very easy to read:

- The Mailing Address indicates the name and address of the primary account owner to which all statements will be sent.
- The Summary of Accounts section lists each of the linked accounts, including the account description, the account number and the registration of each account. This section also provides the value of each account, the percentage of total assets for each account and the entire market value (or net worth) of all accounts included in the SelectLink summary.
- The Summary of Asset Allocation section summarizes the value of each type of investment held in your linked accounts, along with the percentage that each asset category represents.

**Combined Mail** — If you would like to have multiple account statements in your household included in the same envelope, but not summarized in the SelectLink summary, you can enroll in our Combined Mail service by completing the attached application and selecting the “Combined Mail” option.

**Interested Party** — If you have already been setup to receive a duplicate statement for an account(s) held outside of your residence, you can combine it within your SelectLink and/or Combined Mail package. You can enroll in our Interested Party service by completing the attached application and selecting the “Interested Party” option.





Please provide the following information for the accounts to be included in your SelectLink and/or Combined Mail statement package. As you complete this form, keep in mind that to qualify for the SelectLink and Combined Mail options, all accounts must have the same mailing address.



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Questions? Please call 800-927-3059, Monday - Friday, 8 a.m. - 7 p.m. (ET).

**STEP 1: BROKERAGE ACCOUNT INFORMATION (REQUIRED)**

Please indicate the name and address of the first account; this will designate the primary mailing address.

Brokerage Account Owner's Name

Mailing Street Address

City

State

Zip Code

**STEP 2: BROKERAGE ACCOUNT INFORMATION AND SELECTIONS**

Identify the accounts that you would like to include in the SelectLink summary by checking the "SelectLink" box. If you would like to have multiple account statements in your household included in the same envelope, but not consolidated on the SelectLink summary page, please mark the "Combined Mail" box. If you would like to have copies of Interested Party statements included within your SelectLink and/or Combined Mail package, please select the "Interest Party" box. Note: The Consolidated Statements feature is available for TIAA Brokerage accounts only.

1. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

2. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

3. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)





4. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

5. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

6. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

7. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)

8. Please check all that apply:  SelectLink  Combined Mail  Interested Party

Brokerage Account Number

Primary Account Owner's Signature

Joint Account Owner's Signature  
(if applicable)

Additional Account Owner's Signature  
(if applicable)





**RETURN COMPLETED FORM(S)**

**Upload your documents easily from your mobile device or computer.**

Use the TIAA mobile app to quickly upload your completed documents. It's as simple as taking a picture:

- Tap the **Message Center** icon in the upper-right corner of your main screen.
- Select the **Files** header and tap **Upload**. That's it!

Haven't downloaded the TIAA mobile app? Get it today in the **App Store** or **Google Play**.

Don't have a smartphone? It's still easy. From your personal computer, here's what you'll need to do:

- Log in to your **TIAA.org** account and select the **Actions** tab.
- Choose **Upload documents** from the options presented.
- Select **Upload Files** and follow the step-by-step instructions.

Faxing a document or using standard or overnight mail are also available, but can take more time. If you prefer one of these methods, use the information provided below to complete the process.

**FAX:**  
800-914-8922 (within U.S.)

**STANDARD MAIL:**  
TIAA  
P.O. Box 1280  
Charlotte, NC 28201-1280

**OVERNIGHT:**  
TIAA  
8500 Andrew Carnegie Blvd.  
Charlotte, NC 28262

