



Use this form as a Letter of Authorization (LOA) to gift securities from a taxable (non-retirement) account.

Questions? Please call 800-842-2252, Monday - Friday, 8 a.m. - 7 p.m. (ET).

Provide the account which you are withdrawing the gift from. Please provide a contact number in case we need to verify information.

STEP 1: TIAA BROKERAGE ACCOUNT INFORMATION (REQUIRED)

Brokerage Account Number

Contact Phone Number

Name(s) on Account (As it appears on your statement)

The security symbol is usually two to five characters and typically resembles the security name. The CUSIP is nine digits that may contain numbers and letters. For bonds, include the face value under Number of Shares. If you need to add additional securities, please attach a separate letter with all of the information requested in Step 2. Please sign, date, and submit with this authorization.

Note: If you are specifying a specific tax lot for cost basis reporting, please indicate the date the shares were purchased. If no date is provided, or the date provided is not applicable to the tax lots for the requested security, we will use the default tax lot method assigned to your account. For self-directed accounts this is typically First In, First Out, and for Managed accounts this is Minimize short term gains.

STEP 2: SECURITY TO BE GIFTED INFORMATION

Security Name <input type="text"/>	Symbol or CUSIP <input type="text"/>	Number of Shares or ALL (Whole Shares Only) <input type="text"/>
Date of Shares Purchased (mm/dd/yyyy) (Optional) <input type="text"/> / <input type="text"/> / <input type="text"/>		
Security Name <input type="text"/>	Symbol or CUSIP <input type="text"/>	Number of Shares or ALL (Whole Shares Only) <input type="text"/>
Date of Shares Purchased (mm/dd/yyyy) (Optional) <input type="text"/> / <input type="text"/> / <input type="text"/>		
Security Name <input type="text"/>	Symbol or CUSIP <input type="text"/>	Number of Shares or ALL (Whole Shares Only) <input type="text"/>
Date of Shares Purchased (mm/dd/yyyy) (Optional) <input type="text"/> / <input type="text"/> / <input type="text"/>		
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Date of Shares Purchased (mm/dd/yyyy) (Optional) <input type="text"/> / <input type="text"/> / <input type="text"/>		
Security Name <input type="text"/>	Symbol or CUSIP <input type="text"/>	Number of Shares or ALL (Whole Shares Only) <input type="text"/>
Date of Shares Purchased (mm/dd/yyyy) (Optional) <input type="text"/> / <input type="text"/> / <input type="text"/>		





Fields marked with an * are required. Contact the receiving firm if you are unsure about any information. Some firms may provide 2 account numbers - their internal account and the client account that is provided in the FFC line.

STEP 3: RECEIVING ACCOUNT AND DELIVERY INSTRUCTIONS

Recipient Name (Person or Organization to receive Gift)*

Receiving Account Number*

Receiving Firm's or Mutual Fund Company's Name*

Brokerage Firm's Clearing or DTC number.

If the firm is a direct Mutual Fund Company, the MF BIN number is required.*

For Further Credit (FFC) to Account (Name or Number)

NOTE: You may receive a phone call from TIAA verifying your instructions. If we are unable to reach you to verify instructions, your request may be delayed or not completed.

STEP 4: ACCOUNT OWNER(S) SIGNATURE (ALL ACCOUNT OWNERS MUST SIGN AND DATE)

By signing, you acknowledge that you hereby irrevocably relinquish all rights, title, and interest to the assets listed in Step 2, above. TIAA Brokerage does not provide tax advice. Please consult your tax advisor or a qualified tax professional on any potential tax consequences.

I hereby release and discharge TIAA Brokerage and its affiliates from any liability or claims in connection with the aforementioned instructions and agree to indemnify and hold TIAA Brokerage harmless against any losses from any action, claim, or demand of any person based upon TIAA Brokerage acting under these instructions.

Primary Account Holder or Trustee

Print Name

Signature

Today's Date (mm/dd/yyyy)

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Secondday Account Holder or Trustee

Print Name

Signature

Today's Date (mm/dd/yyyy)

 / / 20




Please return ALL numbered pages, including any pages you did not need to complete.

OPTIONS TO RETURN COMPLETED FORM(S)

Option 1: Digitally sign and submit your form.

- If you received a digital form, complete the online signature digital process.

OPTION 2: Use the TIAA mobile app to quickly upload your completed document(s). It's as simple as taking a picture. Haven't downloaded the TIAA mobile app? Get it today in the App Store or Google Play.

- Tap the **Message Center** icon in the upper-right corner of your main screen.
- Go to the **Files** tab, select **Upload** and then follow the instructions.

OPTION 3: If you are using your personal computer, here's what you'll need to do to upload your completed document(s):

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

OPTION 4: If you prefer to fax or mail this form, use the information provided below:

FAX:

800-914-8922 (within U.S.)
704-595-5795 (outside U.S.)

STANDARD MAIL:

TIAA
P.O. Box 1280
Charlotte, NC 28201-1280

OVERNIGHT DELIVERY:

TIAA
8500 Andrew Carnegie Blvd.
Charlotte, NC 28262

