



# Individual gift form.

TIAA Trust, N.A.

**TIAA Trust, N.A. (\*TIAA Trust\*) account name:**

**TIAA Trust account number:** \_\_\_\_\_

Recipient's name: \_\_\_\_\_

Recipient's email address: \_\_\_\_\_ Phone Number \_\_\_\_\_

Street address: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

## CASH GIFT

Dollar amount gift: \_\_\_\_\_

Indicate how would you like the cash gift to be distributed (Check one):

Check to be mailed to Recipient's address listed above

Internal transfer to TIAA Trust account#: \_\_\_\_\_

## SECURITIES GIFT

Name of security: \_\_\_\_\_

Numer of shares: \_\_\_\_\_

Brokerage account name: \_\_\_\_\_

Brokerage account number: \_\_\_\_\_

DTC number: \_\_\_\_\_

Brokerage contact name & phone number: \_\_\_\_\_

Is this an anonymous gift?    Yes            No

Do you want your contact information shared with the gift recipient?    Yes            No            N/A

Upon my/our direction and approval, the individual named above is hereby an approved recipient for gifts from the referenced TIAA Trust Account.

By signing below, you:

- Represent and warrant that you are empowered and authorized to direct, and so direct, TIAA Trust to transfer the securities identified in this form from your account identified in this form to the recipient's account identified in this form.
- Agree to indemnify TIAA Trust (jointly and severally, for accounts with more than one owner) from, and hold TIAA Trust harmless for, any and all losses, liabilities, claims, and costs (including reasonable attorney's fees) resulting from acting upon such instructions.
- Accept all terms and conditions described in this form.
- Accept that any asset not readily transferable might not be transferred within the time frames set by FINRA or other applicable authorities.
- Accept that TIAA Trust is not responsible for changes in the value of assets that may occur during the transfer process.
- **The date of the gifted security will be shown on your client statement.**
- **To determine the value of the gifted security, please work with your tax advisor.**
- Affirm that you are aware of any tax or financial implications that may arise in connection with this gift prior to transfer, including penalties, fees, financial losses, or losses of product features or benefits; the TIAA group of companies does not provide tax or legal advice. Tax and other laws are subject to change, either prospectively or retroactively. Individuals should consult with a qualified independent tax advisor, CPA and/or attorney for specific advice based on the individual personal circumstances.

**Authorized signature:**

**Date:**

**Authorized signature:**

**Date:**



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