

**Rollover From Your Retirement Investments Form Guide for Form F11604**  
**Tax-Deferred Annuity Program for Employees of The Conference Board, Inc.**  
**(U.S. Staff Members) 403(b) - Plan 406562**

Under the Tax-Deferred Annuity Program for Employees of The Conference Board, Inc. (U.S. Staff Members) you can select a lump sum cash distribution, a partial cash distribution and/or a rollover to another eligible plan or IRA.

The Rollover from Your Retirement Investments Form should be used if you are requesting a rollover with respect to amounts held at TIAA-CREF. If you are electing a cash distribution for a portion your account balance, you must submit *Cash Withdrawal from your Retirement Account Form*. If you are requesting multiple transactions, (i.e. Rollover to a Roth IRA, Cash Distribution and a Rollover to a Traditional IRA) then you must submit multiple forms.

**Required Minimum Distribution:** If you will be 70 ½ or older in this calendar year and you are separated from service, the IRS requires that you receive your Required Minimum Distribution (RMD) amount prior to any rollover amount you request. If you have already satisfied your RMD for this calendar year, then you can continue with this rollover. If you have not satisfied your RMD for this calendar year and you submit these rollover forms, then TIAA-CREF will pay your RMD amount for this calendar year prior to this rollover. TIAA-CREF will calculate your RMD amount using the IRS Uniform Life Expectancy table. TIAA-CREF will send the RMD check to your address of record, withholding 10% for federal taxes and applicable state taxes.

**Questions?**

For account information, to check the status of your request or any other questions, **call: 800 842-2252**, Monday - Friday, 8 AM - 10 PM ET, Saturday, 9 AM - 6 PM ET, OR visit **[tiaa-cref.org](http://tiaa-cref.org) 24 hours daily**. Have your user ID and password ready.

**Below are some guidelines to assist you with completing this form in accordance with your plan rules.**

**Step 1, Personal Information:** Complete this section.

**Step 2, Rollover Amount:**

- **Option # 1** - Select this option if you are requesting that your entire account balance be rolled over to another eligible plan or IRA.
- **Option #2** - Select this option if you want to rollover over a portion of your account balance. Complete the question concerning Roth, if you've made Roth contributions.
  - After Tax Monies – Skip this question. Your plan does not allow after-tax contributions.
  - Future Date – Complete this section if you would like your rollover to be processed at a future date.

- **Option #3** – Select this option if you would like to initiate systematic payments from your account to be rolled over to another eligible plan or IRA.

**Step 3, Existing Investments:**

- If you are requesting that your entire account be rolled over to another eligible plan or IRA (Option #1 in Step 2), skip this section and go to Step 7.
- If you requesting a rollover over of only a portion of your account balance ( Option # 2 in Step 2), and you DO NOT want your withdrawal to be taken proportionately across all of your investments then:
  - a.) Enter the investment name(s) that you want rolled over.
  - b.) Enter the percentage or dollar amount of the investment that you would like to be rolled over to another eligible plan or IRA.

**Step 4, Allocations for Rollovers To A Different TIAA-CREF Account:**

- If you are rolling your funds over to another account at TIAA-CREF (a different eligible plan or IRA), complete this section.
- If you are rolling your funds over to another investment provider, skip this section.

**Step 5, Systematic Withdrawals:** If you would like to initiate systematic payments from your account to be rolled over to another eligible plan or IRA, complete this section. (**Note:** Systematic distributions that are being rolled over may not have a duration of 10 years or more.)

**Step 6, Rollovers to An Existing TIAA-CREF Account:**

- If you are rolling your funds over to another account at TIAA-CREF (a different eligible plan or IRA), complete this section.
- If you are rolling your funds over to another investment provider, skip this section.

**Step 7, Rollover to Another Investment Company:**

- If you are rolling your funds over to another investment provider, complete this section.
- If you are rolling your funds over to another account at TIAA-CREF (a different eligible plan or IRA), skip this section.

**Step 8, Roth IRA Rollovers:** If you are rolling funds over to a Roth IRA, complete this section.

**Step 9, Your Signature:** Complete this section.

**Step 10, Additional Information:** Complete this section.

**Step 11, Plan Representative Approval:** You must take this completed form to the Human Resources office at The Conference Board, Inc. for the plan administrator to sign and approve this distribution request.

**Step 12, Please Return Completed Forms Package To:** A Human Resources representative with The Conference Board will submit this form to TIAA-CREF on your behalf once they review and approve the distribution.

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