



Please use this form as instruction to enter or change cost basis on the following Uncovered Securities. Uncovered Securities are securities purchased or acquired prior to the effective date of mandatory cost basis reporting to the IRS (January 1, 2011, for Equities; January 1, 2012, for Mutual Funds; and January 1, 2013, for all other security types). I understand these instructions are for Uncovered Securities and for informational purposes only. Cost basis on Uncovered Securities will not be reported to the IRS. Information in all four columns is required for each security.

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

STEP 1: TIAA BROKERAGE ACCOUNT INFORMATION (REQUIRED)

Brokerage Account Number

Grid of 10 boxes for Brokerage Account Number

Name(s) on Account

Text box for Name(s) on Account

STEP 2: COST BASIS INFORMATION

NOTE: ALL FIELDS MUST BE COMPLETED FOR EACH POSITION. IF LEFT BLANK, THE REQUEST WILL NOT BE PROCESSED.

Table with 4 columns: Symbol/Description, Purchase Date (mm/dd/yyyy), Share Quantity, Total Cost: (including fees and commissions). Rows 1-10.

If you require additional lines, please attach a separate page, which must be signed and dated by all account owner(s).

Signature

Text box for Signature

Today's Date (mm/dd/yyyy)

Date grid with 20 in the year field

Signature

Text box for Signature

Today's Date (mm/dd/yyyy)

Date grid with 20 in the year field





**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

