



To initiate automatic investment of your payments into your TIAA-CREF Funds account(s), complete this form. The form must be received by the 1st business day of the month in order to be applied to your next payment.

One time Payment     Re-occurring Payments

By signing this form, investor(s) acknowledges that neither TIAA-CREF Funds nor any Teachers Advisors, LLC affiliate or service provider to TIAA-CREF Funds has provided the investor(s) with advice, recommendations or suggestions as to any specific investment decisions. Investors in TIAA-CREF Funds are urged to consult their own advisors before making investment-related decisions, including but not limited to, those related to transfer or rollover from retirement plans, purchase or sale of investments, selection or retention of investment managers, or selection of account beneficiaries.

Please send your signed and completed application to TIAA-CREF Funds per Return Completed Forms section below or in the enclosed customer reply envelope. Please call 800-223-1200, enter prompt 1, prompt 2, with any questions, weekdays, 8 a.m. - 10 p.m. (ET).

**1. ACCOUNT REGISTRATION (REQUIRED)**

Please fill out this section with your account number and current registration.

Prefix      First Name      MI      Last Name

          

Social Security Number/  
Taxpayer Identification Number      Day Time Phone Number      Evening Phone Number

      

Email Address

Address Street or P.O. Box (APO and FPO addresses will be accepted)      City      State      Zip Code

          

Address (If the above address is a P.O. Box, you must also provide a street address)      City      State      Zip Code

          

**2. PROVIDE YOUR CONTRACT INFORMATION**

Please list below the contracts, for which your payment(s) should be invested in one or more mutual fund account(s).

Contract   

Contract   

Contract   

Contract   

Approximate Total    \$   



### 3. PROVIDE YOUR PAYMENT INFORMATION

Please list below your account number(s) and the percentage you want allocated to each mutual fund. The total payment from the contracts you listed above can be invested in one or more mutual fund accounts. You cannot have different allocations for different contracts.

**Note: If you currently do not own a TIAA-CREF Funds account, to open a new account you must complete a TIAA-CREF Funds application. All direct deposits to an IRA will be considered current-year contributions. Note, if you are opening a new fund within an existing account, with the allocations given below, please check the box for acknowledgment in the signature section.\***

Fund Name	Fund Number	Account Number	Percent (whole percentages only)	New Account
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>

**Total Percent 100%**

\*\*As of October 2, 2017, the TIAA-CREF Small-Cap Equity Fund is closed to new investors.

Date (mm/dd/yyyy)

Please indicate the effective date of your direct deposit payments:  /  /  20

(If no date is given, direct deposit payments will begin with the next payment cycle.)

### 4. SIGNATURE

#### \*PROSPECTUS AND OTHER DOCUMENTS ACKNOWLEDGMENT

Please check the box below acknowledging your receipt of the following documents:

Prospectus for the investment options available to you ([TIAA.org/public/prospectuses](http://TIAA.org/public/prospectuses))

TIAA Privacy Policy ([TIAA.org/public/support/privacy-policy](http://TIAA.org/public/support/privacy-policy))

TIAA Business Continuity Policy ([TIAA.org/public/about-tiaa/business-continuity](http://TIAA.org/public/about-tiaa/business-continuity))

**Please check this box ▶  
to acknowledge  
electronic receipt of  
prospectuses and other  
required documents**

I acknowledge that I consent to receiving and have received the above-referenced documents through TIAA's website. I further acknowledge that I am able to access these documents on the website. I understand that this acknowledgment applies only to this initial account application.

To select this acknowledgment and consent, you must have access to the website noted above. In either case, you must also be able to download, view and print the documents. You will need Adobe Reader to view and print electronic PDF documents. If you don't have Adobe Reader, go to [adobe.com](http://adobe.com) to download a free copy. To request assistance with accessing these documents electronically, please contact us toll-free at **800-842-2273**. You understand and acknowledge that accessing documents electronically may involve additional costs, including but not limited to, subscription access fees from an internet service provider and printing costs.

Paper versions of the above documents can be ordered, both now and in the future, by calling toll-free **877-518-9161** or go to [TIAA.org](http://TIAA.org). If you are unable to acknowledge that you have received and accessed these documents on the website, please call **877-518-9161** for paper prospectuses at no charge.

**Note:** Unless indicated above, I acknowledge that I have received paper copies of the above-referenced documents.

Please sign exactly as the name of the registered owner appears on your Account Confirmation Statements.

Your Signature (Account Owner)

Today's Date (mm/dd/yyyy)

 /  /  20 


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**RETURN COMPLETED FORM(S) TO:**

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

**STANDARD MAIL:**

TIAA  
P.O. Box 1259  
Charlotte, NC 28201-1259

**OVERNIGHT:**

TIAA  
8500 Andrew Carnegie Blvd.  
Charlotte, NC 28262

