



## TRANSFER TIAA TRADITIONAL TO VARIABLE ACCOUNTS AND/OR MUTUAL FUNDS **TRANSFER PAYOUT ANNUITY**

NEED HELP? 800-842-2252

Weekdays

8 a.m. – 10 p.m. (ET)

Or visit [TIAA.org](http://TIAA.org).

Have your ID and password  
ready.

### **WHAT IS A TRANSFER PAYOUT ANNUITY?**

The Transfer Payout Annuity (TPA) is an option for transferring some or all of your TIAA Traditional account balances in 10 payments over 9 years to one or more of your variable accounts and/or mutual funds in your TIAA and CREF contracts.

Since the TIAA portfolio is made up of long-term investments, transfers can only be made in 10 payments over 9 years.

### **HOW DOES IT WORK?**

You complete the enclosed forms choosing an amount of \$10,000 or more (100% if your account balance is less than \$10,000 but greater than \$2,000) from your TIAA Traditional account, which is then placed into a new Transfer Payout Annuity contract. Each year this new contract will automatically transfer 10% of the value, plus any earnings, and reinvest that amount into the variable account(s) and/or mutual funds you choose.

### **KEY INFORMATION TO CONSIDER**

- If you want to withdraw funds from your CREF accounts, please call us. There are different rules for these withdrawals, so you must complete separate forms.
- We will continue to use the beneficiary designation we have on file for the original contract. Once your Transfer Payout Annuity contract is issued, you may go online at [TIAA.org](http://TIAA.org) to update your beneficiary designations.





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**TRANSFER PAYOUT ANNUITY**

Print in uppercase using black or dark blue ink.

**IMPORTANT:** A full Social Security Number is required to process your request.

If you claim residence AND citizenship outside the U.S., you must complete Form W-8BEN in addition to this form to certify your foreign tax status. To print the W-8BEN form, go to [TIAA.org/forms](http://TIAA.org/forms), and scroll to Find tax forms.

**1. PROVIDE YOUR INFORMATION**

First Name  Middle Initial

Last Name  Suffix

Social Security Number/  
Taxpayer Identification Number  Contact Telephone Number  Extension

State of Legal Residence  (if outside the U.S., write in Country of Residence) Citizenship (if not U.S.)

\* The Plan and Sub Plan Numbers should have been provided when you requested the form. If you don't have them please reference your quarterly statement.

**2. PROVIDE YOUR CONTRACT NUMBERS**

TIAA Number  CREF Number

Plan Number\*  Sub Plan Number\*

Plan Name

If you currently contribute to TIAA Traditional, you should review your allocations. If you want to change your allocations and you have a password, you can visit our website at [TIAA.org](http://TIAA.org) or call us.

**3. WHEN WILL YOUR ANNUAL TRANSFERS BEGIN**

We'll make the first transfer when we issue your Transfer Payout Annuity contract. And for future transfers, we'll transfer funds annually on the first business day of that month. If you wish to change your annual transfer date to a later date, please tell us below.

I want annual transfers to begin on the first day of:  /  20

\*\* The minimum transfer is \$10,000, or 100% if the account balance is less than \$10,000.

Remember, account balances change daily based on market performance. Log in to your account at [TIAA.org](http://TIAA.org) or call us.

**4. CHOOSE THE AMOUNT TO TRANSFER FROM TIAA TRADITIONAL (CHOOSE ONE)**

- A. I want to transfer my entire TIAA Traditional amount.
- B. I want to transfer only a part of my TIAA Traditional available account balance as indicated.  
*If you are not withdrawing/rolling over your entire available account balance, indicate the dollar amount or percentage. Percentages and amounts must be in whole numbers.*

Dollar Amount\*\*  OR Percent of Account Balance  %







**6. YOUR AUTHORIZATION AND SIGNATURE**

By signing below, you agree that:

- You authorize TIAA to make withdrawals from your TIAA Traditional account balances, as stated in this form.
- The date we issue your Transfer Payout Annuity contract cannot be before we receive all necessary papers.
- Once we issue your Transfer Payout Annuity contract, it cannot be revoked and the amount cannot be changed.
- If you transfer the full account balance of your TIAA contract to your Transfer Payout Annuity, that TIAA contract will have no value.
- You authorize the continuation of the beneficiaries under the original contract listed in Section 2. Once the contract is issued, you reserve the right to change this designation at any time.
- For your protection, TIAA may require additional verification of your identity before accepting your transaction as in good order. You agree that your transaction will be valued as of the market close on the business day that all of steps necessary to verify your identity and the transaction to be in good order have been completed. You also agree that in the event these steps are completed after the market close on a business day, then your transaction will be valued as of the market close on the next business day. The amount of money that you receive will depend on the share or unit price on the day on which your transaction is deemed to be in good order. Due to market fluctuations, the price your shares or units ultimately receive could be less than the share or unit price when you initiated this transaction. It is also possible that if we are unable to reach you to verify this transaction within 5 days, this transaction may be canceled.

Under penalties of perjury, I certify that: (1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. citizen or other U.S. person; and (4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Please sign your full legal name with suffix, if applicable, using black or dark blue ink, or online using TIAA's digital signing experiences. Non-TIAA digital signatures, such as signing with Adobe Acrobat, are not accepted. ►

Your Signature

Today's Date (mm/dd/yyyy)

 /  / 20



# TRANSFER TIAA TRADITIONAL TO VARIABLE ACCOUNTS AND/OR MUTUAL FUNDS TRANSFER PAYOUT ANNUITY

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

## 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.)  
**704-595-5795** (outside U.S.)

**STANDARD MAIL:**  
TIAA  
P.O. Box 1268  
Charlotte, NC 28201-1268

**OVERNIGHT:**  
TIAA  
8500 Andrew Carnegie Blvd.  
Charlotte, NC 28262

## CHECKLIST

Did you remember to:

- Complete all necessary personal information.
- Tell us how much you would like to transfer. (Section 4)
- Sign and date this form.
- Call TIAA if you have any questions or need assistance at **800-842-2252**.

## FRAUD WARNING

### FOR YOUR PROTECTION, WE PROVIDE THIS NOTICE/WARNING REQUIRED BY MANY STATES

This notice/warning does not apply in New York.

*Any person who, knowingly and with intent to defraud any insurance company or other person, files an application for insurance or a statement of claim for insurance benefits containing materially false information or conceals, for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and may be subject to criminal penalties, including confinement in prison, and civil penalties. Such action may entitle the insurance company to deny or void coverage or benefits.*

**Colorado residents, please note:** Any insurance company or agent of an insurance company who knowingly provides false, incomplete, or misleading facts or information to a policyholder or claimant for the purpose of defrauding or attempting to defraud the policyholder or claimant with regard to a settlement or award payable from insurance proceeds shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

**Virginia and Washington, DC residents, please note:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

