



Please complete this form to set up automatic investments into or redemptions out of existing mutual fund position(s) held in your brokerage account. You can also establish or edit these instructions online from the actions menu on your positions page or in the drop-down on the Mutual Fund Trading page.

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

STEP 1: BROKERAGE ACCOUNT INFORMATION (REQUIRED)

Brokerage Account Number Brokerage Account Registration/Name(s) (as it appears on your statement)

STEP 2: INVESTMENT SELECTIONS

All AIP purchases will be made from the cash and/or money market fund balance in your brokerage account. Funds must be available prior to any AIP purchase.

Note: Mutual fund position must be established in your TIAA Brokerage account prior to starting an AIP Transaction. Fee(s) may apply.

Please select the type of instructions from the following two options:

New Instructions/Add to Existing Instructions Cancel all previous instructions and replace with this instruction

INSTRUCTIONS (Choose One):

Buy Sell

Note: if you want to establish standing instructions for both a buy and a sell you will need to complete two separate forms.

FREQUENCY (Choose One):

Monthly Quarterly Semiannually Yearly

Start Date* (mm/dd/yyyy)

/ / 20

* If your purchase or sell date falls on a weekend or a holiday, the purchase or sale will be made on the next business day. If we are unable to process your request by the beginning date, your purchase or sale will be made on the next scheduled date.

CUSIP/ Symbol	Fund Name	Amount (\$100 minimum)	End Date (If applicable)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>
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STEP 3: AGREEMENT AND SIGNATURE (REQUIRED)

Note: All owners on the TIAA Brokerage account must sign this authorization.

I authorize Pershing, LLC through TIAA-CREF Individual & Institutional Services, LLC (TIAA Brokerage), to execute automatic investments or redemptions into the fund(s) listed on Section 2. I understand that in order for my AIP to begin, the fund position must be established in my TIAA Brokerage account. I understand that it is my responsibility to ensure that funds are available in my brokerage account prior to any AIP purchase. If a debit balance is created as a result of my AIP purchase, I agree to take immediate action to cover the debit balance. I understand that TIAA Brokerage reserves the right to take action in my brokerage account to cover any debit without prior notice. I understand that these transactions will be subject to the published commission and fee schedule.

Your Signature (Account Owner/Trustee or Custodian) <input style="width: 100%; height: 20px;" type="text"/>	Print Name and Title (if applicable) <input style="width: 100%; height: 20px;" type="text"/>	Today's Date (mm/dd/yyyy) <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> / 20 <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
Your Signature (Co-Account Owner/Trustee) <input style="width: 100%; height: 20px;" type="text"/>	Print Name and Title (if applicable) <input style="width: 100%; height: 20px;" type="text"/>	Today's Date (mm/dd/yyyy) <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> / 20 <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
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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

