



# REQUEST FOR A CHARITABLE DISTRIBUTION FROM AN INDIVIDUAL RETIREMENT ACCOUNT (IRA)

Print in upper case using black or dark blue ink and provide all information.

NEED HELP? 800-842-2252

Weekdays

8 a.m. - 10 p.m. (ET)

Saturday

9 a.m. - 6 p.m. (ET)

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

## 1. PROVIDE YOUR INFORMATION

First Name

Middle Initial

Last Name

Suffix

Social Security Number/

Taxpayer Identification Number

Contact Telephone Number

Extension

Complete this section and select the Traditional IRA the charitable distribution will come from.

## 2. PROVIDE YOUR CONTRACT NUMBER

TIAA IRA Account Number

In the event you plan on making distributions to multiple charities using this form the amount indicated in this section will be treated as the total distribution. Distributions will be taxed for the year in which they are received. You can allocate how much each charity is to receive in section 5 of this form.

## 3. CHOOSE THE AMOUNT TO DISTRIBUTE FROM INVESTMENTS

How much would you like to distribute? (Please select only one)

I would like to distribute \$  proportionately from all available investments to all Nonprofit Organizations. (Enter the dollar amount here and leave the specific investment section below blank.)

I would like to distribute the following amount(s) to all Nonprofit Organizations. Indicate either the dollar amount OR percentage from each account. Percentages must be in whole numbers.

Investment Account/Fund Name	Withdrawal Amount		Percent of Fund Value
<input type="text"/>	\$ <input type="text"/>	OR	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="text"/>	\$ <input type="text"/>	OR	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="text"/>	\$ <input type="text"/>	OR	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="text"/>	\$ <input type="text"/>	OR	<input type="text"/> <input type="text"/> <input type="text"/> %

### IMPORTANT

If you have an IRA with a "closed" TIAA contract please keep in mind that once you withdraw funds from TIAA Traditional and/or TIAA Real Estate in your "closed" contract, you can't move funds back into those same accounts later, and funds distributed from TIAA Traditional will no longer receive the 3% guaranteed minimum rate and any applicable additional amounts. New funds added to TIAA Traditional will go to the account in your "open" TIAA contract, which has a guaranteed minimum rate between 1% and 3% (plus any applicable amounts).





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## 4. SIGN YOUR FORM


I acknowledge that it is my responsibility to ensure the distribution(s) complies with the requirements of Sec. 1201 of the Pension Protection Act of 2006 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended. I assume full responsibility for any adverse tax consequences that may arise as a result of the distribution(s). I have consulted with my own tax advisor and understand the federal and state tax consequences of distribution(s). I have provided a current mailing address to the charitable organization(s). I understand that this is required in order for the charitable organization(s) to provide me with a proper receipt for my contribution. I further acknowledge that TIAA has not provided me with legal or tax advice about the distribution(s).

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 it may result in the transaction being 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.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. Item 4 reproduces the wording in the official Form W-9, but does not apply to you with respect to any intended use of this Form. Please disregard item 4 when completing this Form.

**The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

Please sign your full legal name with suffix, if applicable, using black or dark blue ink. 

Your Signature

Today's Date (mm/dd/yyyy)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	2	0	<input type="text"/>	<input type="text"/>
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If you want to list additional organizations, you may copy this page to indicate your instructions.

## 5. CHARITABLE DISTRIBUTIONS

Please issue a check payable to each nonprofit organization listed below.

### 1. Name of Nonprofit Organization

Street Address

City

State

Zip Code

Attention

Amount of Check

\$

### 2. Name of Nonprofit Organization

Street Address

City

State

Zip Code

Attention

Amount of Check

\$





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5. CHARITABLE DISTRIBUTIONS (CONTINUED)

3. Name of Nonprofit Organization

Street Address

City

State

Zip Code

Attention

Amount of Check

\$

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

RETURN COMPLETED FORM(S) TO:

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

SEND US YOUR FORM ONLINE:

- Log in to your account at [TIAA.org](http://TIAA.org). On the main menu, under "My Account," select the "Upload documents" link.
- Within the "Shared Files" tab in "Message Center," select the "Upload Files" button.

MOBILE UPLOAD:

- Log in to your TIAA app, and click on "Message Center" from the top right menu.
- Click on "Shared Files."
- In the bottom right corner, click on the upload icon and select the folder to upload to.
- Follow the instructions to take a picture and upload your completed form.

