



Please use this form as authorization and instruction to change my Tax Lot Disposition Method to Average Cost for Mutual Fund Holdings. I understand this Tax Lot Disposition Method selection may be irrevocable, would only apply to Mutual Fund holdings and would require written permission from the IRS to change in the future.

If you would like to change your Tax Lot Disposition Method for any other type of holding other than Mutual Funds or have any account-related questions, please call 800-927-3059 Monday – Friday 8 a.m. – 7 p.m. (ET). Fax: 800-914-8922.

STEP 1: BROKERAGE ACCOUNT INFORMATION (REQUIRED)

Brokerage Account Number

A 5

Brokerage Account Owner Name(s)

STEP 2: SIGNATURE(S) (REQUIRED)

ALL account holders must sign using black or dark blue ink. Digital signatures are not accepted.

Your Signature (Primary Account Owner/Trustee/Custodian)

Print Name and Title (if applicable)

Today's Date (mm/dd/yyyy)

/ / 2 0

Your Signature (Secondary Account Owner/Trustee)

Print Name and Title (if applicable)

Today's Date (mm/dd/yyyy)

/ / 2 0

Your Signature (Additional Account Owner/Trustee)

Print Name and Title (if applicable)

Today's Date (mm/dd/yyyy)

/ / 2 0

RETURN COMPLETED FORM(S) TO:

FAX:

800-914-8922

STANDARD MAIL:

TIAA

P.O. Box 1280

Charlotte, NC 28201-1280

OVERNIGHT:

TIAA

8500 Andrew Carnegie Blvd.

Charlotte, NC 28262

SEND US YOUR FORM ONLINE:

- Log in to your account at tiaa.org. On the top most menu, next to "Profile & Settings," select "Messages."
- Within the "Shared Files" tab in "Message Center," select the "Upload Files" button.

MOBILE UPLOAD:

- Log in to your TIAA app, and click on "Upload documents" from the menu.
- Follow the instructions to take a picture and upload your completed form.

