



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).

**STEP 1: BROKERAGE ACCOUNT INFORMATION (REQUIRED)**

Brokerage Account Number	Brokerage Account Owner Name(s)
A <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>

**STEP 2: SIGNATURE(S) (REQUIRED)**

ALL account holders must sign their 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 (Primary Account Owner/Trustee/Custodian)	Print Name and Title (if applicable)	Today's Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>
Your Signature (Secondary Account Owner/Trustee)	Print Name and Title (if applicable)	Today's Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>
Your Signature (Additional Account Owner/Trustee)	Print Name and Title (if applicable)	Today's Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>

**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

