



The following information is required in order for TIAA Brokerage Services to transact the gifting of securities from a Non-Retirement Account. Do not use this form to gift from a retirement account. Requests must be completed in full and signed by all account owners in order to be processed. To ensure accurate delivery of your gift, please contact the receiving Brokerage firm for delivery instructions.

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

STEP 1: BROKERAGE ACCOUNT INFORMATION (REQUIRED)

Brokerage Account Number	Name(s) on Account (As it appears on your statement)
<input type="text"/>	<input type="text"/>

STEP 2: SECURITY TO BE GIFTED INFORMATION For bonds, include the face value under "Number of Shares."

Security Name	Symbol or CUSIP	Number of Shares (Whole Shares Only)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Date of Shares Purchased (mm/dd/yyyy) (Required only if specifying specific shares for cost basis reporting. If nothing is provided, the default will be First-In First-Out.)

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Security Name	Symbol or CUSIP	Number of Shares (Whole Shares Only)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Date of Shares Purchased (mm/dd/yyyy) (Required only if specifying specific shares for cost basis reporting. If nothing is provided, the default will be First-In First-Out.)

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NOTE: If you need to add additional securities, please attach a separate letter with all of the information requested below. The attached letter must also be signed, dated and submitted with this authorization.

STEP 3: RECEIVING ACCOUNT AND DELIVERY INSTRUCTIONS

ALL SECTIONS BELOW ARE REQUIRED. Please contact the receiving firm to obtain this information.

Recipient Name (Person or Organization to receive Gift)	Receiving Account Number
<input type="text"/>	<input type="text"/>
Receiving Brokerage Firm's or Mutual Fund Company's Name	Brokerage Firm's Clearing/DTC or Mutual Fund BIN Number
<input type="text"/>	<input type="text"/>

STEP 4: ACCOUNT OWNER(S) SIGNATURE

By signing, you acknowledge that you hereby irrevocably relinquish all rights, title, and interest to the assets listed in Step 2, above. For information on the tax consequences of gifting securities, consult a qualified tax professional. Please sign using black or dark blue ink.

PLEASE NOTE: You may receive a phone call from TIAA verifying your instructions. If we are unable to reach you to verify instructions, your request may be delayed or not completed.

Print Name	Signature	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"/>
Print Name	Signature	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

