



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)

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

Security Name

Symbol or CUSIP

Number of Shares (Whole Shares Only)

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)

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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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

Receiving Brokerage Firm's or Mutual Fund Company's Name

Brokerage Firm's Clearing/DTC or Mutual Fund BIN Number

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)

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Print Name

Signature

Today's Date (mm/dd/yyyy)

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TIAA BROKERAGE SERVICES
AUTHORIZATION TO GIFT SECURITIES

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](https://www.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.

