



This form may be used **ONLY** to transfer money between TIAA and CREF contracts with the same employer. Do not use this form for any other purpose. The transactions executed by this form are not taxable or reportable to the IRS; however, you will receive a confirmation statement, and it will appear on your quarterly statement.

The rules governing your account and investment options may require multiple transactions to complete your request.

If you have any questions, please call our Telephone Counseling Center at **800-842-2252** Weekdays from 8 a.m. to 10 p.m. and Saturday from 9 a.m. to 6 p.m. (ET). Or visit us online at **TIAA.org** 24 hours a day. Have your user ID and password ready.

Please print using black or dark blue ink.

**IMPORTANT: A full Social Security Number/Taxpayer Identification Number is required to process your request.**

**1. PROVIDE YOUR INFORMATION**

First Name  Middle Initial

Last Name  Suffix

Social Security Number/  
Taxpayer Identification Number  Contact Telephone Number  Extension

Please indicate the Account from which you want to transfer funds. To find your account numbers, log in to your account online or reference your statement.

Only available amounts will be transferred. Some amounts may not be available for transfer.

**2. PROVIDE YOUR CONTRACT NUMBERS**

**TRANSFER MONEY FROM:**

Plan Name

TIAA/CREF Account Number  Plan Number

**TRANSFER MONEY TO:**

Plan Name

TIAA/CREF Account Number  Plan Number

Please note that certain transfers may not be available due to the rules governing your account, while others may require the completion of additional forms.





Transfer amounts will be based on the value of your investments at close of business on the day that your forms are received in good order and may differ from the requested amount.

**3. FROM CONTRACT**

**OPTION 1:** Transfer entire amount available.

**OPTION 2:** Transfer only a portion of the account balance, as indicated below.

If you want to transfer all of the available money in any fund, please use 100% instead of a dollar value for that fund.

Investment/Fund Name	Ticker Symbol	Dollar Amount	Percent of Fund Value
<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"/>	<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"/>	<input type="text"/>	\$ <input type="text"/> OR <input type="text"/> %	<input type="text"/> %

*Only available amounts will be moved.*

Please tell us how you would like to allocate the funds being transferred.

**4. TO CONTRACT**

**OPTION 1:** Move to current allocations on file.

**OPTION 2:** Move to different allocations, as indicated below.

If selecting percentages, please use only whole numbers.

Investment/Fund Name	Ticker Symbol	Dollar Amount	Percent of Transfer Value
<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"/>	<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"/>	<input type="text"/>	\$ <input type="text"/> OR <input type="text"/> %	<input type="text"/> %





By signing below you are agreeing to all the terms and condition in section 5.

5. YOUR SIGNATURE

I authorize TIAA to make the transfers between the TIAA accounts as requested by this form.  
I understand and agree that some or all of the amounts that I have requested to be transferred may not be available for transfer and that only the available amounts will be transferred.  
I understand that some or all of amounts to be transferred may be subject to redemption or other fees, the amounts of which have been disclosed to me, and agree to pay any applicable fees.  
I understand and agree that amounts transferred out of the TIAA Traditional Annuity, TIAA Real Estate Account and CREF annuity balances in the following contract(s) cannot be moved back into the contract(s) and that amounts transferred out of the TIAA Traditional Annuity balances will no longer receive the 3% guarantee and applicable "vintages": Retirement Annuity, Group Retirement Annuity, Supplemental Retirement Annuity, and/or Group Supplemental Retirement Annuity.  
I further understand that, to the extent that the contracts involved in the requested transfer are subject to the Employee Retirement Income Security Act (ERISA), spousal rights may apply, and a signed waiver from my spouse may be required in order to effect the transfer.

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.  
**Note:** Item 4 serves no purpose beyond required reproduction of the official Form W-9 language. Please disregard item 4.  
**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 using black or dark blue ink. Digital signatures are not accepted.

Your Signature \_\_\_\_\_ Today's Date (mm/dd/yyyy)  /  / 20

This section is to be completed only by the Advisor/Consultant completing this form.

6. REFER ALL INQUIRIES OR REQUESTS FOR CLARIFICATION ON THIS FORM TO:

Name \_\_\_\_\_ Contact Telephone Number \_\_\_\_\_  
Relationship:  Non TIAA Advisor (Registered Investment Advisor)  TIAA Financial Consultant  TIAA Individual Advisory Services

Your transfer request will be effective on the business day we receive your completed forms in good order. Requests received after market close will be processed with an effective date of the next business day.

7. RETURN COMPLETED FORM(S) TO:

**FAX:** 800-914-8922 (within U.S.) 704-988-7653 (outside U.S.)  
**STANDARD MAIL:** TIAA P.O. Box 1268 Charlotte, NC 28201-1268  
**OVERNIGHT:** TIAA 8500 Andrew Carnegie Blvd. Charlotte, NC 28262

- Log in to your account at 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.

