

Please print in uppercase using black or dark blue ink. **To add or remove donors or successors, this form must be completed by the Primary Donor.** All other updates may be completed by any Donor. Sign and fax or mail completed form as indicated on the bottom of Page 8.

Giving Fund Name

Please indicate who is completing this form by checking one of the boxes below:

Primary Donor (Required to add or remove Donor(s), Individual Successor(s) or Charitable Beneficiary(ies))

Donor

Title

First Name

Middle Initial

Last Name

Suffix

Social Security Number

Daytime Telephone Number

Email Address

 - -

 Questions or need assistance?
 Call 800-392-4420.

 Monday - Friday,
 8 a.m. - 10 p.m. (ET)

 Saturday
 9 a.m. - 6 p.m. (ET)

What would you like to update? Check all that apply.

Actions with a + must be requested by the Primary Donor, whose signature is required on this form.

 Actions with an asterisk(*) may also be updated online at donorfirst.tiaa charitable.org.

- Change Giving Fund Name.....see Section 1
- Name Change for Current Donor (attach copy of official name change document)see Section 2
- Add or Remove Donors+see Section 3
- Update Donor Contact Information and Communication* Preference.....see Section 4
- Add or Update Individual Successor(s) or Charitable Beneficiary(ies)+see Section 5
- Grant Access to a Financial Advisorsee Section 6
- Recommend Investment Reallocation*see Section 7

1. CHANGE GIVING FUND NAME

To update the name of your Giving Fund, enter the new name below.

New Giving Fund Name

In order for TIAA Charitable to accept a name change, we must receive a copy of the official name change document. Please mail that to us along with this completed form.

2. NAME CHANGE FOR CURRENT DONOR

Please tell us the current donor name we have on record, and the new name you would like us to use.

Please include a copy of the official name change document.

Name as it appears in Giving Fund records

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name		Suffix
<input type="text"/>		<input type="text"/>

New Name

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name		Suffix
<input type="text"/>		<input type="text"/>

Please select whether you would like to add a new donor or remove an existing donor.

This form has space to enter two donors. Please copy this page to make additional changes.

Donors may contribute to the Giving Fund and may recommend grants and investment allocations.

3. ADD OR REMOVE DONOR(S)

Add/Remove Update 1

Add (Please complete all information below. The added donor must sign in Section 8.)

Remove (Please complete Name and Address areas in full.)

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name		Suffix
<input type="text"/>		<input type="text"/>

Social Security Number (new donors only)

 - -

Date of Birth (new donors only)

 / /

Mailing Address

City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>

Country of Address	Country of Residence	Country of Citizenship
<input type="text"/>	<input type="text"/>	<input type="text"/>

Daytime Telephone Number	Evening Telephone Number	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>

Check here to receive paper correspondence at an annual cost of \$7.00.

3. ADD OR REMOVE DONOR(S) (CONTINUED)**Add/Remove Update 2** Add (Please complete all information below. The added donor must sign in Section 8.) Remove (Please complete Name and Address areas in full.)

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>

Last Name	Suffix
<input type="text"/>	<input type="text"/>

Social Security Number (new donors only)	Date of Birth (new donors only)
<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Mailing Address

City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>

Country of Address	Country of Residence	Country of Citizenship
<input type="text"/>	<input type="text"/>	<input type="text"/>

Daytime Telephone Number	Evening Telephone Number	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>

 Check here to receive paper correspondence at an annual cost of \$7.00.

4. UPDATE DONOR CONTACT INFORMATION AND COMMUNICATION PREFERENCE**Contact Update 1:** For whom are you updating information?

Donor Name (First, Middle, Last)

Indicate what type of information you are changing and then complete the relevant items below:

 Mailing Address Daytime Telephone Evening Telephone Email Address Send statements electronically Send paper correspondence at an annual cost of \$7.00

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number Evening Telephone Number Email Address

 Contact Update 2: For whom are you updating information?

Donor Name (First, Middle, Last)

Indicate what type of information you are changing and then complete the relevant items below:

 Mailing Address Daytime Telephone Evening Telephone Email Address Send statements electronically Send paper correspondence at an annual cost of \$7.00

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number Evening Telephone Number Email Address

You may name individuals to succeed you on your Giving Fund with full donor rights and privileges, or charitable organizations to benefit from the Giving Fund balance in equal amounts. Individual successors or charitable beneficiaries may be named – you may not combine both successors and beneficiaries.

To add additional Successors, please copy this page.

5. ADD OR UPDATE INDIVIDUAL SUCCESSOR(S) OR CHARITABLE BENEFICIARY(IES)

Create a succession plan to specify how your Giving Fund assets should be handled upon your death. Neither Successor(s) nor Beneficiary(ies) have access to your Giving Fund during your lifetime. Please copy this page to add additional Individual Successor(s).

NAME INDIVIDUAL SUCCESSOR(S)
Check One:
 Add Remove

Name of Individual Successor #1

Social Security Number
 - -
Date of Birth
 / /
Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone Number

Email Address

Check One:
 Add Remove

Name of Individual Successor #2

Social Security Number
 - -
Date of Birth
 / /
Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone Number

Email Address

You may name charitable organizations to benefit from the Giving Fund balance in equal amounts. To add additional Beneficiaries, please copy this page.

Individual successors or charitable beneficiaries may be named – you may not combine both successors and beneficiaries.

**5. ADD OR UPDATE INDIVIDUAL SUCCESSOR(S) OR CHARITABLE BENEFICIARY(IES)
 (CONTINUED)**
RECOMMEND CHARITABLE BENEFICIARIES

Check One: Add Remove **Name of Charitable Beneficiary #1**

Mailing Address

City State Zip Code

Country of Address Daytime Telephone Number

Employer Identification Number - Email Address (if available)

Check One: Add Remove **Name of Charitable Beneficiary #2**

Mailing Address

City State Zip Code

Country of Address Daytime Telephone Number

Employer Identification Number - Email Address (if available)

You may use this section to grant a TIAA-CREF Financial Advisor access to your Giving Fund, or remove an Advisor who currently has access to your Giving Fund.

6. ADD OR UPDATE YOUR FINANCIAL ADVISOR INFORMATION

By providing TIAA Charitable with the name of my current Financial Advisor at TIAA-CREF Individual & Institutional Services, LLC (TC Services), I am authorizing TIAA Charitable to share with TC Services, its service providers and affiliates, as well as my current or future associated advisor (collectively, my "Financial Advisor"), any information relating to my donation(s) to TIAA Charitable, including related application, accounts, donor recommendations and any other activity in any form, by phone, online or by download, for any use by my Financial Advisor in the course of providing financial products and services to me.

Financial Advisor at TC Services:

Add Financial Advisor Remove Financial Advisor

Name (First, Middle, Last)

Add Financial Advisor Remove Financial Advisor

Name (First, Middle, Last)

Contributions to TIAA Charitable are invested to create potential for tax-free growth.

Broad Market options provide diversified investment exposure through a single Lifestyle fund with holdings divided between equities and fixed-income instruments.

Socially Responsible options include allocations of varying mixes of a socially responsible equity fund and a socially responsible bond fund. Select the single option that includes the allocation that you prefer.

Flex investment options offer the opportunity to select from a mix of equity, fixed-income and money market funds.

7. RECOMMEND INVESTMENT REALLOCATION

You may recommend a single option from one of three approaches in the column on the left - Broad Market, Socially Responsible or Flex. Or, to create a customized portfolio utilizing more than one fund, choose Mix and Match (in the right column). Investment allocations may be changed once per 30-day period.

CHOOSE A SINGLE OPTION SOLUTION (select one from the list below)

OR MIX AND MATCH

Allocations must total 100%

Broad Market

- Lifestyle Income
- Lifestyle Conservative
- Lifestyle Moderate
- Lifestyle Growth
- Lifestyle Aggressive

Socially Responsible

- Social Choice Income
- Social Choice Conservative
- Social Choice Moderate
- Social Choice Growth
- Social Choice Aggressive

Flex

- TIAA-CREF Money Market
- TIAA-CREF Bond
- TIAA-CREF Bond Index
- TIAA-CREF Equity Index
- TIAA-CREF Social Choice Low Carbon Equity
- TIAA-CREF Growth & Income
- TIAA-CREF International Equity Index
- TIAA-CREF International Equity

Broad Market

- Lifestyle Income %
- Lifestyle Conservative %
- Lifestyle Moderate %
- Lifestyle Growth %
- Lifestyle Aggressive %

Socially Responsible

- Social Choice Income %
- Social Choice Conservative %
- Social Choice Moderate %
- Social Choice Growth %
- Social Choice Aggressive %

Flex

- TIAA-CREF Money Market %
- TIAA-CREF Bond %
- TIAA-CREF Bond Index %
- TIAA-CREF Equity Index %
- TIAA-CREF Social Choice Low Carbon Equity %
- TIAA-CREF Growth & Income %
- TIAA-CREF International Equity Index %
- TIAA-CREF International Equity %

Please sign using black or dark blue ink.

All new Donors must sign.

Please sign your full legal name with suffix, if applicable, using black or dark blue ink. Digital signatures are not accepted.

8. SIGNATURES OF ANY ADDED DONORS

I acknowledge that I have read the TIAA Charitable Program Guidelines: Program Circular and agree to the terms set forth therein. I understand that once accepted all contributions are irrevocable and nonrefundable, and contributions are subject to the exclusive legal control of TIAA Charitable. All recommendations from donors are subject to review and approval by TIAA Charitable.

Donor #1 Signature

Today's Date (mm/dd/yyyy)

 / / 2 0

Donor #2 Signature

Today's Date (mm/dd/yyyy)

 / / 2 0

Donor #3 Signature

Today's Date (mm/dd/yyyy)

 / / 2 0

TIAA Charitable does not provide legal or tax advice. Please consult your tax advisor. Charitable deductions are subject to Internal Revenue Code limitations, based generally on your adjusted gross income and the character of any securities you contribute to your Giving Fund. There may also be state and local tax benefits to making contributions, but the content provided here relates to taxation at the federal level only. Availability of certain federal income tax deductions may depend on whether you itemize deductions. Charitable contributions of capital gain property held for more than one year are usually deductible at fair market value. Deductions for capital gain property held for one year or less are usually limited to cost basis. Before establishing your Giving Fund, taxpayers should seek advice based on their own particular circumstances from an independent legal or tax advisor.

If you have added or removed Donor(s), Individual Successor(s) or Charitable Beneficiary(ies), the Primary Donor must sign. The Primary Donor is the first donor added to your Giving Fund at the time it was established.

If you have not added or removed Donor(s), Individual Successor(s) or Charitable Beneficiary(ies), any Donor may sign.

9: SIGNATURE TO AUTHORIZE UPDATES

Only one signature is needed.

I hereby certify that, to the best of my knowledge, all information presented in connection with this application is accurate, and I will promptly notify TIAA Charitable in writing of any changes.

Primary Donor Signature

(Required for adding/removing Donor(s) or Individual Successor(s), as noted at left)

Today's Date (mm/dd/yyyy)

 / / 2 0

Donor Signature (not required if Primary Donor has signed above)

(For changes other than adding/removing Donor(s) or Individual Successor(s))

Today's Date (mm/dd/yyyy)

 / / 2 0

MAIL OR FAX THIS FORM TO:

TIAA Charitable
 8910 Purdue Rd., Suite 500
 Indianapolis, IN 46268

Fax:
 877-736-4620
Email: forms@tiaa charitable.org

Questions or Need Assistance? Please call TIAA Charitable at 800-392-4420. Our business hours are Monday - Friday, 8 a.m. - 10 p.m. and Saturday, 9 a.m. - 6 p.m. (ET). Or, email us at donorservices@tiaa charitable.org.