

This form may be used to contribute to a Giving Fund that has already been established. To open a new Giving Fund, please use the Application for a New Giving Fund, available at [tiaacharitable.org/tools/forms](http://tiaacharitable.org/tools/forms). You may also make contributions online at [tiaacharitable.org](http://tiaacharitable.org).

All contributions are irrevocable and may be eligible for an immediate tax deduction.

Please print in uppercase using black or dark blue ink.

**For contributions of complex assets** such as real estate, C-corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties or copyrights, *do not complete this form*. Please contact us at 800-392-4420 to discuss your specific situation.

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)

### 1. GIVING FUND TO WHICH THIS CONTRIBUTION IS BEING MADE

Giving Fund Name

Giving Fund Account Number







(If you don't know your Giving Fund Account Number, it can be found online or on your Giving Fund Statement).

### 2. CONTRIBUTOR INFORMATION

Please check one box below to indicate whether the person making this contribution and completing this form is:

A Donor associated with this Giving Fund

A Third-Party Contributor

For third-party contributions of \$10,000 or more, please provide the contributor's SSN and date of birth.

Social Security Number











Date of Birth (mm/dd/yyyy)









Title

First Name

Middle Initial

Last Name

Suffix

Mailing Address (will be used for tax receipt)

City

State



Zip Code

Country of Address

Daytime Telephone Number

Evening Telephone Number

Email Address

The minimum contribution is \$250, which may include:

- cash, via check or Electronic Funds Transfer
- publicly traded securities
- grants from another donor-advised fund
- certain complex assets which may include real estate, C-corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties and copyrights

Contributions are subject to review by TIAA Charitable.

If you need space for additional contributions, please copy this page.

### 3. CONTRIBUTE TO YOUR GIVING FUND

**CONTRIBUTION 1:** Amount (For securities, please indicate estimated amount) \$

Asset Type (Check One)

Check

Stock, Bond or Mutual Fund (Please complete the Securities Transfer Form, included in the last two pages of this form.)

Company/Mutual Fund Name

Transferring Institution



Grant from Donor-Advised Fund at (Institution Name)

Electronic Funds Transfer from your bank account:

Bank Name

Account Number

Bank Routing/ABA Number




Name(s) as it appears on bank account

Checking  Savings

Complex Assets: For contributions of complex assets, such as real estate, C-corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties and copyrights, please contact us at **800-392-4420** to discuss your specific situation.

**CONTRIBUTION 2:** Amount (For securities, please indicate estimated amount) \$

Asset Type (Check One)

Check

Stock, Bond or Mutual Fund (Please complete the Securities Transfer Form, included in the last two pages of this form.)

Company/Mutual Fund Name

Transferring Institution



Grant from Donor-Advised Fund at (Institution Name)

Electronic Funds Transfer from your bank account:

Bank Name

Account Number

Bank Routing/ABA Number




Name(s) as it appears on bank account

Checking  Savings

Complex Assets: For contributions of complex assets, such as real estate, C-corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties and copyrights, please contact us at **800-392-4420** to discuss your specific situation.

Contributions to TIAA Charitable are invested to create potential for tax-free growth. Please review fund information at [tiaa charitable.org/investments](http://tiaa charitable.org/investments) or in the TIAA Charitable Program Guidelines: Program Circular.

**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.

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

#### 4. RECOMMEND INVESTMENT ALLOCATION

You may allocate your contribution according to your current investment strategy, or you may recommend a specific allocation strategy for this contribution below.

- Please allocate my contribution in accordance with my current strategy.
- Please allocate my contribution according to the recommended percentages below (you may recommend one or more options. For donors seeking a single option, the Broad Market and Socially Responsible choices each provide a mix of stocks, bonds, and short-term instruments):

##### Broad Market

- Lifestyle Income (Target: 20% Equity)    %
- Lifestyle Conservative (Target: 40% Equity)    %
- Lifestyle Moderate (Target: 60% Equity)    %
- Lifestyle Growth (Target: 80% Equity)    %
- Lifestyle Aggressive (Target: 100% Equity)    %

##### Socially Responsible

- Social Choice Income (Target: 20% Equity)    %
- Social Choice Conservative (Target: 40% Equity)    %
- Social Choice Moderate (Target: 60% Equity)    %
- Social Choice Growth (Target: 80% Equity)    %
- Social Choice Aggressive (Target: 95% Equity)    %

##### Flex

- TIAA-CREF Money Market    %
- TIAA-CREF Short-Term Bond    %
- 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    %

Total **1 0 0%** (Allocations must total 100%)

**5. SIGNATURES**

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 and donor-advisors are subject to review and approval by TIAA Charitable.

If I have elected to contribute via electronic funds transfer from my bank account, my signature on this form authorizes and requests TIAA Charitable to instruct my bank to present an Automated Clearing House (ACH) transaction on my account indicated in Section 3. I agree to indemnify TIAA Charitable from any liability for any losses TIAA Charitable may sustain in relying on these instructions.

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

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

Contributor Signature

Today's Date (mm/dd/yyyy)

/ / 20

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.

**CONTRIBUTION FORM RETURN INSTRUCTIONS:**

Please return this form, along with the attached Securities Transfer Form (required for contributions of stocks, bonds and mutual funds), to:

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

**Fax:**  
**877-736-4620**

**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](mailto:donorservices@tiaa charitable.org).



# GIVING FUND SECURITIES TRANSFER FORM

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**THIS FORM IS NOT REQUIRED** for donations of nonpublicly traded securities, C-Corp stock, LLC and limited partnership interests, life insurance policies, patents, royalties, or copyrights. For these contributions, please call TIAA Charitable® at **800-392-4420**.

Contributor Name	Contributor Phone Number
<input type="text"/>	<input type="text"/>

Contributor Address

Giving Fund Name

**IMPORTANT:** A Securities Transfer Form is **required for each account** from which you are transferring securities. If you are transferring from multiple accounts, please print additional copies of this form.

### SECURITIES TRANSFER INSTRUCTIONS (CHECK ONE)

I would like TIAA Charitable to initiate the transfer of securities on my behalf.  
 Please **complete Section 1**, sign this form in Section 2, and **mail** the original copy (with wet signature) along with a **recent account statement** to TIAA Charitable (see reverse).

**OR**

I would like my broker to initiate the transfer of securities on my behalf.  
 1) Please sign this form in Section 2 and email/fax to TIAA Charitable (see reverse: delivery instructions).  
 2) Additionally, please contact your broker and provide the delivery instructions (see reverse: broker delivery instructions).

### 1. DELIVERING INSTITUTION (TRANSFER FROM)

Broker Financial Institution

Address

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

Account Type	Account Number
<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"/> <input type="text"/> <input type="text"/> <input type="text"/>

Contact Name	Phone Number
<input type="text"/>	<input type="text"/>

Continued on reverse side

**1. DELIVERING INSTITUTION (TRANSFER FROM) (CONTINUED)**

Transfer the assets described below (including fractional shares or mutual fund shares that can't be transferred in kind) from the account listed on the previous page. If you prefer to specify a tax lot, please contact your broker and identify the lot acquisition date and lot acquisition cost.

Asset Type (Check one) <input type="checkbox"/> Stock <input type="checkbox"/> Bond <input type="checkbox"/> Mutual Fund	Asset Description (Ex. Apple) <input type="text"/>	Symbol/Ticker (Ex. AAPL) <input type="text"/>	Number of Shares (Ex. 2,500) <input type="text"/>
Asset Type (Check one) <input type="checkbox"/> Stock <input type="checkbox"/> Bond <input type="checkbox"/> Mutual Fund	Asset Description (Ex. Apple) <input type="text"/>	Symbol/Ticker (Ex. AAPL) <input type="text"/>	Number of Shares (Ex. 2,500) <input type="text"/>
Asset Type (Check one) <input type="checkbox"/> Stock <input type="checkbox"/> Bond <input type="checkbox"/> Mutual Fund	Asset Description (Ex. Apple) <input type="text"/>	Symbol/Ticker (Ex. AAPL) <input type="text"/>	Number of Shares (Ex. 2,500) <input type="text"/>

**2. AUTHORIZATION TO COMPLETE TRANSACTION(S)**

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 asset transfers are irrevocable and nonrefundable, and transferred assets are subject to the exclusive legal control of TIAA Charitable.

*Please sign your full legal name with suffix, if applicable, using black or dark blue ink. Digital signatures are not accepted. For accounts with joint tenants, both signatures are required.*

Signature #1 <input type="text"/>	Print Name <input type="text"/>	Today's Date (mm/dd/yyyy) <input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>
Signature #2 <input type="text"/>	Print Name <input type="text"/>	Today's Date (mm/dd/yyyy) <input type="text"/> / <input type="text"/> / 20 <input type="text"/> <input type="text"/>

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 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.

**For Internal Use Only**  
 (Medallion Signature Guarantee)

**DELIVERY INSTRUCTIONS**

TIAA Charitable  
 Attention: Asset Transfer Services  
 8910 Purdue Rd., Suite 500  
 Indianapolis, IN 46268  
**Fax for broker-initiated transfers:**  
**877-736-4620**

**BROKER DELIVERY INSTRUCTIONS**

If you are directing your broker to transfer securities to TIAA Charitable, please share these instructions. This information is unnecessary if TIAA Charitable is facilitating your securities transfer.

**All DTCC-eligible securities:**  
 Deliver to SEI Private Trust Company  
 DTC# 2039  
 Institution Number: 78429  
 Agent Bank ID#: 94952  
 Internal Account # 11129-C  
 Interested Party ID #1: 52587  
 FFC: Donor-Advised Account Number: 882291901

**Federal Reserve Bank securities:**  
 ABA# 042000013  
 FRB Mnemonic: U.S. Bank, N.A, Trust  
 Sub Account: 1050/Trust  
 For SEI Account: 001050985490  
 FFC: Donor-Advised Account Number: 882291901

**Mutual fund share transfers:**  
 Please call 314-244-5125 or 314-244-5190.

**Need help?** 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](mailto:donorservices@tiaa charitable.org).