

Please visit www.tiaa charitable.org to review the TIAA Charitable Program Guidelines: Program Circular prior to establishing your Giving Fund.

Please print in uppercase using black or dark blue ink.

Questions?
 Call 800-392-4420.
 Monday - Friday,
 8 a.m. - 10 p.m. (ET)
 Saturday
 9 a.m. - 6 p.m. (ET)

1. NAME YOUR GIVING FUND

Personalize your Giving Fund by giving it a name.

Giving Fund Name (e.g., Doe Family Fund)

You have the option to grant a TIAA Financial Advisor access to your Giving Fund.

2. AUTHORIZE YOUR FINANCIAL ADVISOR TO ACCESS YOUR GIVING FUND

By providing TIAA Charitable with the name of my current Financial Advisor at TIAA-CREF Individual & Institutional Services, LLC, I am authorizing TIAA Charitable to share with TIAA-CREF Individual & Institutional Services, LLC, 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, including 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 TIAA-CREF Individual & Institutional Services, LLC:

First Name	Last Name	City	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>

You may add a maximum of six donors. Each donor will receive correspondence, including statements, according to the communication preferences indicated on the form.

This form has space to enter two donors. *Please copy this page to add up to four additional donors.*

†Removal of a donor requires the notarized signature of the donor being removed. Please call TIAA Charitable at 800-392-4420 to request a Donor Removal Form.

3. DONOR INFORMATION

Up to six donors may be associated with a Giving Fund and all donors share equal rights and privileges. All donors may contribute to a Giving Fund, recommend investment allocations, and appoint donors and successors. Donors also serve as Grant Advisors, with full privileges to recommend grants and charitable beneficiaries (see note).†

Donor #1

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	Date of Birth
<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"/> <input type="text"/> / <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"/>	<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"/>

*If you would like to establish a Giving Fund on behalf of an organization, please contact us at 800-392-4420.

Please copy this page to add up to four additional donors.

3. DONOR INFORMATION (CONTINUED)
Donor #2

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	Date of Birth	
<input type="text"/>	<input type="text"/>	
Mailing Address		
<input type="text"/>		
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"/>

You may name 1) individual successor donors to succeed you with full donors rights and privileges, 2) recommend charitable organizations as beneficiaries of the Giving Fund balance in equal amounts, or 3) recommend a combination of successors and beneficiaries.

If you recommend a combination, 50% of the Giving Fund balance will remain in the Fund for your successors. The remainder will be distributed to the charitable organizations in equal amounts.

Successors do not have access to your Giving Fund until the death, incapacitation or resignation of all Donors associated with your Giving Fund. Please do not enter the name of any current Giving Fund Donor.

4. DESIGNATE SUCCESSOR DONOR(S)[†] OR CHARITABLE BENEFICIARY(IES)

Create a succession plan to specify how your Giving Fund assets should be handled upon your death.

4A. NAME SUCCESSOR(S)

Title	Name of Successor Donor #1	
<input type="text"/>	<input type="text"/>	
Social Security Number	Date of Birth	Relationship to Donor
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mailing Address		
<input type="text"/>		
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"/>

[†] Donors must be 18 or older. If a Giving Fund succession plan includes successor donors, and no successor donor has reached the age of 18 at the time of the death, incapacitation or resignation of the last surviving Donor, TIAA Charitable will proceed as follows:

- If at least one successor is age 13 or older, TIAA Charitable will maintain the Giving Fund until the successor reaches the age of 18.
- If no successor is at least age 13 and the succession plan includes a charitable beneficiary(ies), TIAA Charitable will transfer the remaining Giving Fund balance to the charitable beneficiary(ies) in equal amounts. If the succession plan does not include a charitable beneficiary, the remaining funds will be transferred to one or more qualified charitable organizations selected at the discretion of the Board of Directors of TIAA Charitable.

Please copy this page to add additional successors or charitable beneficiaries.

4A. DESIGNATE SUCCESSOR DONOR(S) OR CHARITABLE BENEFICIARY(IES)
 (CONTINUED) Please copy this page to add additional successors or charitable beneficiaries

Title **Name of Successor Donor #2**

Social Security Number

Date of Birth / /

Relationship to Donor

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 as beneficiaries of the Giving Fund balance in equal amounts. If you recommend a combination of successors and beneficiaries, 50% of the Giving Fund balance will remain in the Fund for your successors. The remainder will be distributed to the charitable organizations in equal amounts.

4B. RECOMMEND CHARITABLE BENEFICIARY(IES)

Name of Charitable Beneficiary #1

Mailing Address

City **State** **Zip Code** **Daytime Telephone Number**

Employer Identification Number -

Email Address (if available)

Name of Charitable Beneficiary #2

Mailing Address

City **State** **Zip Code** **Daytime Telephone Number**

Employer Identification Number -

Email Address (if available)

TIAA Charitable accepts contributions of:

- 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.

Initial contributions must total \$5,000 or more. All contributions are irrevocable and may be eligible for an immediate tax deduction.

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

5. CONTRIBUTE TO YOUR GIVING FUND

CONTRIBUTION 1: 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 application.)

Company/Mutual Fund Name	Transferring Institution
<input type="text"/>	<input type="text"/>

Grant from Donor-Advised Fund at (Institution Name)

Electronic Funds Transfer from your bank account:

Bank Name	Account Number	Bank Routing/ABA Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Name(s) as it appears on bank account

Checking Savings

Complex Assets: Check the appropriate box below. A TIAA Charitable representative will contact you.

- Real Estate C-Corp Stock LLC/Ltd. Partnership
- Life Insurance Policy Patent, Royalty, Copyright

CONTRIBUTION 2: 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 application.)

Company/Mutual Fund Name	Transferring Institution
<input type="text"/>	<input type="text"/>

Grant from Donor-Advised Fund at (Institution Name)

Electronic Funds Transfer from your bank account:

Bank Name	Account Number	Bank Routing/ABA Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Name(s) as it appears on bank account

Checking Savings

Complex Assets: Check the appropriate box below. A TIAA Charitable representative will contact you.

- Real Estate C-Corp Stock LLC/Ltd. Partnership
- Life Insurance Policy Patent, Royalty, Copyright

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

Please review fund information in the Program Circular or online at tiaa charitable.org.

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.

6. RECOMMEND INVESTMENT ALLOCATION

You may recommend one or more options from the list below.

Note: 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 Core 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%)

7. 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 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 application authorizes and requests TIAA Charitable to instruct my bank to present an Automated Clearing House (ACH) transaction on my account indicated in section 5. 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 application 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.

Donor 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.

APPLICATION RETURN INSTRUCTIONS:

Please return this form, along with the attached Securities Transfer Form (if required), 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.



GIVING FUND SECURITIES TRANSFER FORM

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

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

Account Type Account Number

Contact Name Phone Number

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

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, please share these instructions.

All DTCC-eligible securities:
 Deliver to SEI Private Trust Company
 DTC# 2663
 FFC: Donor-Advised Account Number:
 882291901

Mutual fund share transfers:
 Please call 314-244-5185 or 314-244-5190

Federal Reserve Bank securities:
 ABA# 042000013
 FRB Mnemonic: U.S. Bank, N.A, Trust
 Sub Account: 1050/Trust
 For SEI Account: 001050985491
 FFC: Donor-Advised Account Number:
 20075-F 882291901

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 Or email us at donorservices@tiaa charitable.org.