



# 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)	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  
 Institution Number: 74746  
 Agent Bank ID#: 74746  
 Internal Account # 20075-D  
 Interested Party ID #1: 64728  
 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: 001050985491  
 FFC: Donor-Advised Account Number: 20075-F 882291901

**Mutual fund share transfers:**  
 Please call 314-244-5185 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).