



STATE UNIVERSITIES RETIREMENT SYSTEM of Illinois

TIAA-CREF-to-Fidelity Transfer Form

FIDELITY 71056

TIAA-CREF GRA contract number: _____

TIAA-CREF RC contract number: _____

1 Participant	Name:	SSN:	Daytime Phone#:																																																																																																																																					
2 Funds to be Transferred FROM TIAA-CREF:	<p>Circle ONLY One <u>Entire Account Balance</u> – to transfer account balances for all TIAA-CREF funds, including GRA and RC contracts. (If selected, proceed to Section 3)</p> <p>Or <u>Specific Fund(s)</u> (If selected, specify the dollar amount, or write “ALL”, to be transferred from the following TIAA-CREF fund(s).)</p>		<p>SEND FORM TO: TIAA-CREF P.O. Box 1268 Charlotte, NC 28201-1268</p>																																																																																																																																					
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3
Funds to be Transferred TO Fidelity:

Please note that all "to" funds must be in terms of a percentage. **If you wish to transfer funds WITHIN a particular Provider, please call that Provider directly and DO NOT use this form.**

Managed Income Portfolio (632)	Total Market Index Fund (397)	Extended Market Index Fund (398)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Spartan U.S. Bond Index Fund – Institutional Class (651)	Buffalo Small Cap Fund (886)	Low-Priced Stock Fund - Class K (316)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
PIMCO Total Return Fund Inst. (474)	Contrafund (022)	International Index Fund (399)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Four-in-One Index Fund (355)	Ariel Fund (884)	Diversified International Fund - Class K (325)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Puritan Fund (004)	Growth Company Fund- Class K (025)	Worldwide Fund (318)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Spartan 500 Index Fund – Institutional Class (650)	American Beacon Large Cap Value Fund Institutional (882)	Hartford Capital Appreciation Y Fund (889)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Real Estate Investment Portfolio Fund (675)		
<input type="text"/> %		

Life Cycle Funds

Freedom 2000 K Fund (370)	Freedom 2020 K Fund (372)	Freedom 2040 K Fund (718)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Freedom 2005 K Fund (312)	Freedom 2025 K Fund (314)	Freedom 2045 K Fund (317)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Freedom 2010 K Fund (371)	Freedom 2030 K Fund (373)	Freedom 2050 K Fund (374)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Freedom 2015 K Fund (313)	Freedom 2035 K Fund (315)	Freedom Income K Fund (369)
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

Total Fidelity Percentage = 100%

4
Participant Signature

If I have a balance of \$5,000 or less in a TIAA Traditional account, I authorize the transfer of any eligible accumulation into the CREF Money Market account for the purposes of this withdrawal request.

If you wish to reallocate future contributions, please call SURS at 1-800-ASK-SURS. You must sign and date the form to have your transfer instructions carried out.

Participant Signature _____

Date _____

Instructions for Completing the SURS TIAA-CREF-to-Fidelity Transfer Form

1. Participant Information

In the space provided, write your name, Social Security number, and phone number where you can be reached during the day.

2. Funds to be transferred FROM:

In the spaces provided, identify either a dollar amount, within a specific fund and contract number (GRA or RC), "ALL" of your accumulations within a specific fund, or your entire TIAA-CREF account balance.

Transfers will be based on the closing market price at 4:00 p.m. Eastern Time on the day your request is received. If your request is received after 4:00 p.m., the amount will be based on the closing prices the next business day.

*NOTE:

Group Retirement Annuity (GRA) contracts:

Because of the guarantees and liquidity restriction of the GRA TIAA Traditional Annuity, transfers from this account are made gradually over a 9-year period. (If your total accumulation in TIAA Traditional is \$5,000 or less, the total amount can be transferred immediately.) When you request a transfer from TIAA Traditional, the amount you request will be placed in a Transfer Payout Annuity (TPA), and 10% of the amount will be transferred immediately. Over a 9-year period the remainder will be transferred each year exactly 12 months from the date your Transfer Payout Annuity is issued. Once you submit this form, TIAA-CREF will send you a TPA kit with a form to complete; you can also request the TPA kit by calling TIAA-CREF at 1-888-219-8310.

Retirement Choice (RC) contracts:

Because of the guarantees and liquidity restriction of the RC TIAA Traditional Annuity, transfers from this account are made monthly over 84 months. (If your total accumulation in TIAA Traditional is \$5,000 or less, the total amount can be transferred immediately.) When you request a transfer from TIAA Traditional, the amount you request will be placed in a Transfer Payout Annuity (TPA). Once you submit this form, TIAA-CREF will send you a TPA kit with a form to complete; you can also request the TPA kit by calling TIAA-CREF at 1-888-219-8310.

3. Funds to be transferred TO:

In this section, please allocate the transfer dollars listed in Section 2 among the Fidelity funds. Please express the amount to be transferred to each fund in whole number percentages, and be sure that the percentages add up to 100.

4. Signature and mailing instructions:

This form will not change which Provider(s) will receive future contributions from your earnings. To change the allocation of future contributions, call SURS at 1-800-275-7877.

You must sign and date the form to have your transfer instructions carried out. Then, mail the signed form to TIAA-CREF at the address listed in Section 2.

For TIAA-CREF Use Only Wiring Instructions:

Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0090