



**3. Level of Authorization** (Check one only. Please add any additional instructions below.)

**Inquiry Only**

This includes the right to receive specific information from TIAA-CREF about any of your existing qualified tuition plan accounts\* and general information about TIAA-CREF products.

**Limited Rights Plus Inquiry**

This includes the right to receive specific information from TIAA-CREF about any of your existing qualified tuition plan accounts\* and general information about TIAA-CREF products, as well as (to the extent permitted by Section 529 of the Internal Revenue Code and the qualified tuition plan statute and rules):

- transfer funds among investment options

**Full Power of Attorney/Fiduciary Rights**

Please attach an executed TFI Section 529 Power of Attorney form. This authorization level will apply for all court-appointed representatives for whom TIAA-CREF has received appropriate evidence of authority. If you have any questions, please call Advisor Services at 888 842-0318.

\*TIAA-CREF has no responsibility for the monitoring or contents of financial statements prepared by third parties. You understand that you may receive financial statements from TIAA-CREF and your financial advisor that cover the same account transactions.

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**4. Duplicate Quarterly Statements**

Do you want the authorized firm/advisor to receive duplicate quarterly statements of your existing TIAA-CREF qualified tuition plan accounts? (If you don't make a selection, we will assume "No.")  Yes  No

**5. Duration**

TIAA-CREF will assume that this authorization is in effect until we are notified in writing.

**6. Account Owner Signature**

Signature of Account Owner \_\_\_\_\_ Date \_\_\_\_\_

If you have any questions, please call us at 888 842-0318, weekdays from 8:00 a.m. to 5:00 p.m.

For new accounts, please mail the authorization along with each account application.

For existing accounts, please mail the authorization form to:

**[INSERT Section 529 PLAN NAME]  
c/o Boston Financial Data Services (BFDS)  
30 Dan Road  
Canton, MA 02021-2809**