



Partnership Eligibility Questionnaire

Please complete this form so that we can determine whether or not your partnership is eligible to establish a Keogh with TIAA-CREF.

Please return the completed form to us, along with any partnership documents that describe the nature of your business, in the business reply envelope provided. If you do not have the envelope, please mail the form to: TIAA-CREF, 730 Third Avenue, New York, NY 10017

I. Name of partnership:

2. Number of partners there are in the partnership: _____

3. At least 50% of the partners in the partnership must be eligible for TIAA and CREF in order for the partnership to open a TIAA-CREF Keogh. A partner is eligible for a Keogh if any one of the following applies:

- the individual is employed by an *eligible institution*; or
- the individual currently has at least one TIAA or CREF contract or certificate, including individual life insurance and the Teachers Personal Annuity (group insurance contracts and TIAA-CREF Enterprises products are not applicable for this purpose); or
- the individual retired at age 55 or older after working at an *eligible institution* for at least 5 years; or
- the individual is a trustee of an *eligible institution*; or
- the individual is the current or surviving spouse or domestic partner of a person in one of the first four categories listed above.

To be eligible, the institution must affirmatively be determined eligible by TIAA-CREF. Types of institutions eligible to participate in the TIAA-CREF system include colleges, universities, private schools, public K-12, teaching hospitals, museums and libraries, and cultural institutions, private foundations and other nonprofit organizations that are primarily engaged in education or research.

How many partners are eligible? _____

4. Is the partnership primarily engaged in education or research? Yes No

5. Please describe the primary activities of the partnership

Signature (Must be signed by a partner or someone authorized to sign on behalf of the partnership) Date

Print name

Address
