



OFFICE OF HUMAN RESOURCES

As of July 1, 2011, you have the ability to contact TIAA-Cref to initiate the transfer of your existing retirement funds to your new account with The Standard, if you wish. You are not required to transfer funds from TIAA Cref to The Standard. However, if you wish to do so, please use the following instructions to request a “rollover” form for all Non-TIAA Traditional funds (CREF) and a “Transfer Payout Annuity” for TIAA Traditional funds.

TIAA-Cref Rollover Instructions

Step 1: Dial - 1-800-842-2252

Step 2: Choose Option “4”

Step 3: Choose Option “0” - The phone mail system will not give you an option to choose “0”. Choose “0” regardless to be directed to a representative.

Step 4: Enter your social security number

Step 5: Tell the representative that you would like to roll your account to your employer’s new retirement plan provider. Please keep in mind that it is the representative’s job to talk you out of moving your money from TIAA Cref. There have been instances in which a TIAA-Cref representative has made contact a few days later through an employee’s home phone for the purposes of discouraging the transfer of the funds.

Step 6: The representative will have the forms mailed to your home or emailed to your TIAA-Cref website. Our recommendation is to have the forms mailed to your home, but this is your choice.

Step 7: On August 16 at 9:00 a.m. Conte-Browne will conduct a meeting in Parmer Cinema (Boyer Hall) to assist employees with completing the forms and the transfer process. Please feel free to attend this meeting to ensure that everything is in order for your transfer. You will want to bring your forms with you to the meeting. We will have a notary available at this meeting as well.

Please Note: There will NOT be a second meeting at 10:00 a.m. There will be one group meeting at 9:00 a.m.