

**CARNEGIE MELLON**

**REQUEST FOR CHANGE  
UNIVERSITY RETIREMENT PLAN OPTION**

Effective \_\_\_\_\_, please change my retirement plan option as indicated below. I understand that University retirement plan contributions will be directed to the option of my choice until such time as I submit in writing a request for a change in my retirement plan option. (NOTE: A change in your retirement plan option for University retirement plan contributions may be made only once per month.) The University's retirement plan contribution will be allocated to TIAA and/or CREF in accordance with your most recent allocation instructions to TIAA and/or CREF, and/or to Vanguard for contribution to your custodial account(s) per your most recent instructions to Vanguard. I understand that Carnegie Mellon cannot guarantee the investment results of either organization nor does Carnegie Mellon recommend one organization over the other.

**FROM:**

**TO:**

\_\_\_\_\_ TIAA-CREF  
Group Retirement Annuities

\_\_\_\_\_ TIAA-CREF  
Group Retirement Annuities

\_\_\_\_\_ Vanguard

\_\_\_\_\_ Vanguard

\_\_\_\_\_  
NAME—PLEASE PRINT

\_\_\_\_\_  
SOCIAL SECURITY NUMBER

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

**NOTE:** If you are enrolling in one of these options for the first time, you must also complete and attach a TIAA-CREF or Vanguard application. Forms can be downloaded from <http://www.cmu.edu/hr/forms.html#retirement>.