

TIAA-CREF—New Business Checklist

In order to do business with Lorence and Vander Zwart and TIAA CREF:

1. LVZ must have on file a signed Solicitors Agreement.
2. Client must have an established account. LVZ can not establish accounts for clients at TIAA CREF.

In addition to the forms listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.

The following forms need to be completed and returned directly to LVZ to add third party management.

- LVZ Solicitor Disclosure Brochure
- LVZ Investment Management Agreement Form
- LVZ Investor Suitability Questionnaire
- TIAA-CREF Authorization to Access form
- TIAA-CREF Fee Billing Authorization form



Did you know:

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?

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