CDARS® CD maturity instructions



Use this form to provide maturity instructions for your CDARS® CD account. Enter your information clearly using blue or black ink.

1. Your information

Name of account holder (Account title)	Security code (If left blank, your request could be delayed)		
Address	City	State	ZIP
Phone	Email		

2. CD information

CDARS® CDs do not automatically renew. You must provide instructions prior to maturity. If providing instructions for multiple CDs on this form, the same instruction must apply to all CD accounts.

Note: If you would like to provide different instructions for different CDs, please submit separate forms. You may also contact the Client Solutions Team at 1.888.882.3837.

CD account number	Maturity date
CD account number	Maturity date
CD account number	Maturity date
CD account number	Maturity date

3. Select renewal option

Refer to your Account Terms, Disclosures and Agreements Booklet for complete CD renewal policies, which can be found on our website.

- Renew with full balance (principal plus interest). The new CD will be for:
 - \odot the same term \bigcirc a new term: ____
- \odot Renew and add additional funds. The new CD will be for:
 - \bigcirc the same term \bigcirc a new term: _____

Additional deposit amount¹:_____

How would you like to fund the additional deposit amount?

- O Fund additional amount from an existing EverBank account. Account number:_____
- O Fund additional amount from an existing external bank account.² Account number: ____
- \bigcirc (In-person in a Financial Center only): Fund by cash or check.
- \odot Renew and take a partial withdrawal. The new CD will be for:
 - \bigcirc the same term \bigcirc a new term: _____

Withdrawal amount	

How would you like to receive your withdrawn funds?

- O Deposit into an existing EverBank account. Account number: _____
- O Deposit into an existing external bank account.³ Account number: _____
- \bigcirc Send a U.S. dollar check.
- O Wire funds. U.S. dollar wire transfer form.
- (In-person in a Financial Center only): Issue a U.S. dollar check.

4. Select CD closing/non-renewal option

- O Deposit into an existing EverBank account. Account number: _
- O Deposit into an existing external bank account.³ Account number: _____
- O Deposit principal and interest into a new account with the same title. Streamlined personal account application
- \bigcirc Send a U.S. dollar check.
- O Wire funds. U.S. dollar wire transfer form required.
- \odot (In-person in a Financial Center only): Issue a U.S. dollar check.

5. Signature

By signing below, the undersigned certifies that the undersigned has read, understands and agrees to the Account Terms, Disclosures and Agreements Booklet applicable to the CD for which the instructions above are being provided, and the undersigned gives consent to the bank to follow the instructions indicated above.

The undersigned agrees that we, EverBank, National Association ("EverBank"), in our sole discretion, may accept documents that you have signed and sent to us by electronic means, like fax, email, or other file transmittal processes we might offer. By sending us any such document by electronic means, the undersigned agrees that we may rely on it and on the signature, and that the document is binding on the signer even if the original signed document is not delivered to us.

Date

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Account holder signature

6. Submit

Upload this form and any additional documentation so that we can move forward in the quickest and most secure way. Simply log in to your account at everbank.com and:

- Select the **Actions** tab
- In the TIAA Documents section, select Upload documents
- Select Files you would like to upload
- Select Folder to upload files to and follow directions

Download a PDF by clicking on the icon or by visiting

- 1. Any funds that are added at maturity will become subject to an early withdrawal penalty.
- 2. If funds aren't available or if the transfer should fail for any reason at the time of processing your request, we'll follow your renewal instructions, but without the additional deposit.
- 3. If we are unable to complete the transfer for any reason, including, but not limited to, that account being closed or otherwise unavailable to receive the funds, we may instead send a check to you at your address of record once your CD has matured.

For bank use only:	Additional notes:			
	Verify client	Date verified	FC number	Associate name (Print first & last name)
	CD check amount	Date issued		

