



A TIAA Company

NUVEEN FUNDS
**COVERDELL EDUCATION SAVINGS ACCOUNT
DIRECT ASSET TRANSFER FORM**

Page 1 of 6

Please use this form to authorize Nuveen Funds to initiate a direct transfer of your current Coverdell Education Savings Account (Coverdell ESA) to a Coverdell ESA with Nuveen Funds.

By signing this form, investor(s) acknowledges that neither Nuveen Funds nor any affiliate or service provider to Nuveen Funds has provided the investor(s) with advice, recommendations or suggestions as to any specific investment decisions. Investors in Nuveen Funds are urged to consult their own advisors before making investment-related decisions, including but not limited to those related to transfer or rollover from retirement plans, purchase or sale of investments, selection or retention of investment managers, or selection of account beneficiaries.

Send your signed and completed form to Nuveen Funds per the Return Completed Forms section below or in the enclosed customer reply envelope. Please contact Nuveen Funds with any questions at 800-257-8787.

1. ACCOUNT REGISTRATION

In Section A below, please provide the requested information about the person who controls the current Account. In Section B below, provide the requested information about the Student who is the beneficiary of either a new or existing Coverdell ESA from Nuveen Funds.

A. Person Who Controls the Current Account

☐ Parent ☐ Student ☐ Legal Guardian (If Legal Guardian, submit proof of guardianship)

First Name MI Last Name

Address Street or P.O. Box (APO and FPO addresses will be accepted) City State Zip Code

Address (If the above address is a P.O. Box, you must also provide a street address) City State Zip Code

Primary Phone Number Phone Number Type ☐ Mobile ☐ Home ☐ Business ☐ Secondary Phone Number Phone Number Type ☐ Mobile ☐ Home ☐ Business

Alternate Phone Number Phone Number Type ☐ Mobile ☐ Home ☐ Business ☐ Email Address

Social Security Number

B. Student Information

First Name MI Last Name

Address Street or P.O. Box (APO and FPO addresses will be accepted) City State Zip Code

Address (If the above address is a P.O. Box, you must also provide a street address) City State Zip Code

Daytime Phone Number Evening Phone Number Social Security Number



2. SHAREHOLDER AUTHORIZATION FOR ASSET TRANSFER

Please provide information on the financial institution where your assets are currently held. This authorization instructs my current Trustee/Custodian to liquidate and transfer all or part of my current Coverdell ESA to Nuveen Funds. Please send all related correspondence to Nuveen Funds P.O. Box 219140 Kansas City, MO 64121-9140. Make all checks payable to Nuveen Funds.

Transfer should be according to the following instructions: (Write in 100% for whole transfers.)

| Current Account Number | Fund Name | Transfer | Percent |
|------------------------|----------------------|-------------------------|---------------------------------------------------------------------|
| <input type="text"/> | <input type="text"/> | \$ <input type="text"/> | OR <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="text"/> | <input type="text"/> | \$ <input type="text"/> | OR <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="text"/> | <input type="text"/> | \$ <input type="text"/> | OR <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="text"/> | <input type="text"/> | \$ <input type="text"/> | OR <input type="text"/> <input type="text"/> <input type="text"/> % |

Name of Custodian/Trustee

Attention

Address

Address

City

State

Zip Code

Phone Number



3. INVESTMENT INSTRUCTIONS

Please indicate whether you are establishing a new **Coverdell ESA** or whether you wish to invest in your current Coverdell ESA from Nuveen Funds. Note: The minimum initial investment is \$2,000 per fund. The minimum subsequent investment per fund is \$100.

☐ Please invest these funds in the existing Coverdell ESA. Account Number: OR

☐ I am opening a new **Coverdell ESA** (attached is my completed application).

Please indicate the Nuveen Funds and the percentage of transferred assets you wish to allocate to each mutual fund.

☐ Please check here to set this allocation for future investments unless other instructions are received.

A CLASS

| FUND NAME (FUND CODE) | AMOUNT | PERCENT | FUND NAME (FUND CODE) | AMOUNT | PERCENT |
|---------------------------------------------------------|-------------------------|------------------------------------------------------------------|---------------------------------------------------------|-------------------------|------------------------------------------------------------------|
| Nuveen 5-15 Year Laddered Tax Exempt Bond Fund (98) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Equity Index Fund (65) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen All-American Municipal Bond Fund (1167) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Equity Long/Short Fund (5044) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Arizona Municipal Bond Fund (5002) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Flexible Income Fund (5052) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Bond Index Fund (91) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Floating Rate Income Fund (5064) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen California High Yield Municipal Bond Fund (1780) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Georgia Municipal Bond Fund (5006) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen California Municipal Bond Fund (5003) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Global Dividend Growth Fund (3037) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Colorado Municipal Bond Fund (5004) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Global Equity Income Fund (1759) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Connecticut Municipal Bond Fund (5005) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Global Infrastructure Fund (6725) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Core Bond Fund (66) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Global Real Estate Securities Fund (7270) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Core Equity Fund (64) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Green Bond Fund (2608) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Core Impact Bond Fund (45) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen High Yield Fund (95) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Core Plus Bond Fund (96) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen High Yield Income Fund (5055) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Credit Income Fund (6942) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen High Yield Municipal Bond Fund (5000) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Dividend Growth Fund (5031) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Inflation Linked Bond Fund (90) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Dividend Value Fund (6759) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Intermediate Duration Municipal Bond Fund (1170) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Emerging Markets Debt Fund (2794) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen International Bond Fund (2957) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Emerging Markets Equity Fund (67) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen International Dividend Growth Fund (5068) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Emerging Markets Equity Index Fund (69) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen International Equity Fund (61) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |

* Effective 12/13/24 the Nuveen Social Choice Low Carbon Equity Fund merged into Nuveen Large Cap Responsible Equity Fund.

** Effective 2/28/25 the following name change was made: Nuveen Mid Cap Growth Opportunities Fund was renamed Nuveen Small/Mid Cap Growth Opportunities Fund.

† Effective 3/1/25 Nuveen Mid Cap Growth Fund was renamed to Nuveen Quant Mid Cap Growth Fund.

†† Effective 7/1/25 Mid Cap Value 1 Fund was renamed to Nuveen Mid Cap Value Opportunities Fund.

(Continued)



3. INVESTMENT INSTRUCTIONS (CONTINUED)**A CLASS**

| FUND NAME (FUND CODE) | AMOUNT | PERCENT | FUND NAME (FUND CODE) | AMOUNT | PERCENT |
|-----------------------------------------------------|-------------------------|------------------------------------------------------------------|-------------------------------------------------------------|-------------------------|------------------------------------------------------------------|
| Nuveen International Opportunities Fund (49) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Mid Cap Value Fund (87) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen International Responsible Equity Fund (2762) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Minnesota Intermediate Municipal Bond Fund (6804) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen International Value Fund (1159) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Minnesota Municipal Bond Fund (6484) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Kansas Municipal Bond Fund (5007) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Missouri Municipal Bond Fund (1186) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Kentucky Municipal Bond Fund (5008) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Money Market Fund (63) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Large Cap Growth Fund (68) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Multi Cap Value Fund (1157) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Large Cap Responsible Equity Fund (62)* | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Nebraska Municipal Bond Fund (5022) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Large Cap Select Fund (2605) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen New Jersey Municipal Bond Fund (5013) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Large Cap Value Fund (85) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen New Mexico Municipal Bond Fund (5014) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Large Cap Value Opportunities Fund (5034) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen New York Municipal Bond Fund (5015) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifecycle Retirement Income Fund (70) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen North Carolina Municipal Bond Fund (5016) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifestyle Aggressive Growth Fund (94) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Ohio Municipal Bond Fund (5017) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifestyle Conservative Fund (78) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Oregon Intermediate Municipal Bond Fund (6779) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifestyle Growth Fund (93) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Pennsylvania Municipal Bond Fund (5018) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifestyle Income Fund (77) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Preferred Securities and Income Fund (5040) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Lifestyle Moderate Fund (79) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Quant International Small Cap Equity Fund (2966) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Limited Term Municipal Bond Fund (5001) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Quant Mid Cap Growth Fund (86)† | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Louisiana Municipal Bond Fund (5009) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Quant Small Cap Equity Fund (88) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Managed Allocation Fund (99) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Quant Small/Mid Cap Equity Fund (2956) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Maryland Municipal Bond Fund (5010) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Real Asset Income Fund (6732) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Massachusetts Municipal Bond Fund (5011) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Real Estate Securities Fund (817) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Michigan Municipal Bond Fund (5012) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Real Estate Securities Select Fund (89) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Mid Cap Value Opportunities Fund (6786)†† | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Short Duration High Yield Municipal Bond Fund (5026) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |

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3. INVESTMENT INSTRUCTIONS (CONTINUED)**A CLASS**

| FUND NAME (FUND CODE) | AMOUNT | PERCENT | FUND NAME (FUND CODE) | AMOUNT | PERCENT |
|---------------------------------------------------|-------------------------|------------------------------------------------------------------|---------------------------------------------------------|-------------------------|------------------------------------------------------------------|
| Nuveen Short Duration Impact Bond Fund (2609) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Small/Mid Cap Growth Opportunities Fund (6449)** | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Short Term Bond Fund (97) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Small/Mid Cap Value Fund (5037) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Short Term Bond Index Fund (2797) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Strategic Income Fund (1345) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Short Term Municipal Bond Fund (5024) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Strategic Municipal Opportunities Fund (6992) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Small Cap Growth Opportunities Fund (2454) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Virginia Municipal Bond Fund (5019) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Small Cap Select Fund (5061) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Winslow Large-Cap Growth ESG Fund (5049) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Small Cap Value Fund (6740) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Nuveen Wisconsin Municipal Bond Fund (5020) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |
| Nuveen Small Cap Value Opportunities Fund (5028) | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % | Total Amount or Percentage | \$ <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> % |

4. SIGNATURE

Please provide the signature of the Student or Parent/Legal Guardian. If the Student is a minor under the law in the Student's state of residence, the Parent or Legal Guardian must execute this Transfer of Assets Authorization.

The undersigned acknowledges having sole responsibility for the foregoing investment choices, and acknowledges having received the current prospectuses for the Nuveen Funds.

The undersigned understands that the requirements for a valid transfer between Coverdell ESAs are complex, and acknowledges having responsibility for complying with all requirements and for the tax results of any such transfer.

PLEASE SIGN HERE

Signature Guarantee (only if required by current Custodian or Trustee)

Please Check One:

☐ Student ☐ Parent ☐ Legal Guardian

Your Signature

Today's Date (mm/dd/yyyy)

 / / 20

Signature Guaranteed by:

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†† Effective 7/1/25 Mid Cap Value 1 Fund was renamed to Nuveen Mid Cap Value Opportunities Fund.



RETURN COMPLETED FORM(S) TO:

Please return ALL numbered pages, including any pages you did not need to complete.

STANDARD MAIL:

Nuveen Funds
P.O. Box 219140
Kansas City, MO 64121-9140

OVERNIGHT:

Nuveen Funds
801 Pennsylvania Ave
Suite 219140
Kansas City, MO 64105-1307

FOR INTERNAL USE ONLY

ACCEPTANCE BY NEW CUSTODIAN

To be completed by UMB Bank, n.a. UMB Bank, n.a. agrees to accept transfer of the amount designated for deposit to the Student's Nuveen Funds Coverdell ESA, and requests the liquidation and transfer of assets as indicated above.

By

Today's Date (mm/dd/yyyy)

 / / 20