

**2020 OCSP \$25 ANNIVERSARY MATCH
TERMS & CONDITIONS**

PROMOTION TIMING: The Oklahoma 529 College Savings Plan (OCSP) / TIAA-CREF Tuition Financing, Inc. (TFI) \$25 Promotion (the “Promotion”) begins on 7/1/20 at 12:01 AM Central Time (CT) and ends on 12/31/20 at 11:59 PM CT (the “Promotion Period”).

PROMOTION SPONSOR AND ADMINISTRATOR: TIAA Tuition Financing, Inc. (TFI) (“Sponsor”)

PROMOTION DESCRIPTION: To receive a \$25 matching deposit (“the Matching Deposit”), eligible individuals must (a) open a new Oklahoma 529 College Savings Plan account online (for a new unique Account Owner/Beneficiary combination) during the Promotion Period with an initial deposit of at least \$25 to be contributed and invested at the time the new account is opened and (b) establish a recurring contribution for the new account of at least \$25 per month, and shall be maintained at minimum for three months. Limit: Only one Matching Deposit per new unique Account Owner/Beneficiary combination. Void where prohibited or restricted by law. The Matching Deposit will be made to the eligible account on the following schedule if the recurring contribution requirement has been met:

If the new OCSP account is opened by:	The match will be deposited on or about...
July 31, 2020	November 30, 2020
October 31, 2020	February 28, 2021
December 31, 2020	April 30, 2021

ELIGIBILITY: Promotion open to legal residents of the 50 United States who are at least 18 years of age or older as of July 1, 2020 and have a social security number or federal taxpayer identification number. The following are excluded: (a) members, officers, and employees of the Oklahoma Office of the State Treasurer, TFI and its parent, subsidiaries, affiliates, owners, members, directors, managers, officers, employees, trustees, agents; and their respective immediate family members (spouse, domestic partner, parents, legal guardians, grandparents, grandchildren, siblings, children and “step” of each) and those individuals living in their same household; and (b) FINRA affiliated customers. All taxes and other costs associated with the Promotion are solely the responsibility of the recipient and/or beneficiary.

MISCELLANEOUS: The Sponsor is not responsible for errors, omissions, interruptions, deletions, defects, or delays in operation or transmission of information, in each case whether arising by way of technical or other failures or malfunctions or computer hardware or software, communications devices, data corruption, theft, unauthorized access to or alteration of Promotion materials, or otherwise. Sponsors reserve the right (a) to modify, suspend, or terminate this Promotion should any technical failure, unauthorized human intervention, or other causes beyond Sponsors’ reasonable control corrupt or adversely affect the security, administration, or proper conduct of this Promotion; and (b) to disqualify any individual who tampers with the Promotion process.

Consider the investment objectives, risks, charges and expenses before investing in a state 529 college savings plan. Carefully read the Plan Description available on ok4savings.org.

Investments in a state 529 college savings plan are neither insured nor guaranteed and there is risk of investment loss.

TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Oklahoma 529 College Savings Plan. 1207102