



FINANCIAL SERVICES FOR THE GREATER GOOD™

Sample

TIAA-CREF Mutual Funds IRA Distribution Form

Use this form to request normal or premature distributions from either your Traditional or Roth IRA. Please refer to the disclosure statement for more details on whether any tax or penalty applies to your distribution. Of course, you should consult your tax advisor before making a decision.

You cannot use a single form to take distributions from BOTH Traditional/Rollover IRAs and Roth IRAs. Please use a separate IRA Distribution Form for each type of IRA from which you are taking distributions.

Send your signed and completed Form to TIAA-CREF Funds in the enclosed customer reply envelope.

Please call 1 800 223-1200 with any questions. Our Representatives are available Monday through Friday, 8:00 a.m. – 10:00 p.m. E.T.

Mailing Address
TIAA-CREF Funds
P.O. Box 8009
Boston, MA
02266-8009

Overnight Mailing Address
TIAA-CREF Funds
30 Dan Road
Canton, MA
02021-2809

1 ACCOUNT INFORMATION *(Please print or type.) Attach a copy of your current IRA statement to help expedite this process.*

- Male Female
- Mr. Mrs. Ms. Dr. Prof. Other _____

First Name _____ Middle Initial _____

Last Name _____

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Social Security Number

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Tax Identification Number

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|
Date of Birth

Address **Street or P.O. Box (APO and FPO addresses will be accepted.)**

Address **If the above address is a P.O. Box you must also provide a street address.**

City _____

State _____ Zip Code _____

E-Mail Address _____

(_____) (_____) _____
Daytime Phone Number Evening Phone Number

- Check here if this is a change to an existing systematic withdrawal plan. An existing systematic withdrawal plan based on life expectancy cannot be changed.

2 IRA DISTRIBUTION

Traditional IRA

- Normal** (You are age 59½ or older.)
- Premature** (You are under age 59½. To claim an exception to the early withdrawal penalty you must file IRS Form 5329 with your tax returns.)
- Premature Exempt** (You are under age 59½ and distributions are made under a schedule of substantially equal periodic payments.)
- Death**
- Disability**
- Remove excess contribution** of \$ _____ made for the _____ tax year. If the corrective distribution is made by or before the filing deadline for the tax year of the excess contribution, earnings (gains or losses) attributable to the contribution(s) will also be returned.

Roth IRA

- Qualified** (You are age 59½ or older, and have owned a Roth IRA for at least 5 years.)
- Exception Applies** (You are age 59½ or older or the distribution is due to death, disability or substantially equal periodic payments.)
- Premature** (You are under age 59½. To claim an exception to the early withdrawal penalty you must first file IRS Form 5329.)
- Remove excess contribution** of \$ _____ made for the _____ tax year. If the corrective distribution is made by or before the filing deadline for the tax year of the excess contribution, earnings (gains or losses) attributable to the contribution(s) will also be returned.

3 DISTRIBUTION AMOUNTS

Fixed Amount Please distribute \$ _____ from my TIAA-CREF Mutual Funds IRA(s).

Entire Balance

Dividend and Capital Gains Earnings (You must be age 59½ or older.) Any earnings on your IRAs will be sent to you.

Required Minimum Distribution Please select life expectancy factor:

- Calculate my Required Minimum Distribution based on the Uniform Life Expectancy Table.
- My spouse is my sole primary beneficiary and is more than ten years younger than I am. Calculate my Required Minimum Distribution based on the Joint Life Expectancy Table.

