



WITHDRAWAL TO SATISFY REQUIRED MINIMUM DISTRIBUTION

QUESTIONS?

800 842-2252

For account information,
to check the status of your
request or any questions:

Monday – Friday
8 a.m. – 10 p.m. (ET)

Saturday
9 a.m. – 6 p.m. (ET)

tiaa-cref.org
24 hours daily
Have your user ID and
password ready.

Since you are 70^{1/2} or older, you may be subject to federal required minimum distributions, which means you must annually receive some portion of your account balance or you will be subject to a tax penalty. If you are making this withdrawal request to satisfy your annual required minimum distribution and would like us to calculate the required amount and you're married, we'll need your spouse's date of birth to calculate the amount that you need to receive.

Our calculations will be based solely on account balances in TIAA and CREF and will change each year. Any account balances you have with sources other than TIAA-CREF are not included in this calculation.

WITHDRAWAL AMOUNT

Are you taking this withdrawal to meet Minimum Distribution Requirements?

NO (Do not complete the rest of this page.)

YES (check here, and complete information below)

CHECK IF EITHER APPLIES:

I want to include all applicable cash withdrawals I've already taken from the plan listed in the above section this year and have TIAA-CREF calculate my required minimum distribution.

This is to satisfy my required minimum distribution (current year only).

I have provided my own calculation. \$

I want TIAA-CREF to calculate my minimum distribution.

Are you married?

No Yes

Is your spouse the sole/primary beneficiary?

No Yes

Spouse's name (please print)

Spouse's date of birth (mm/dd/yyyy)

 / /

TAX WITHHOLDING

Please specify the following. Otherwise, we will withhold 10% federal tax from your withdrawal and any applicable state taxes.

No withholding

Default Federal Withholding of 10%

Specified amount

\$ **OR** %