



We need to verify your date of birth, and your annuity partner's date of birth if applicable, in order to determine eligibility for certain options as well as to calculate the amount of lifetime income payable to you.

Please print using black or dark blue ink.  
NEED HELP?  
800-842-2252  
Weekdays  
8 a.m. - 10 p.m. (ET)  
Or visit TIAA.org.

1. PROVIDE YOUR INFORMATION

First Name [ ] Middle Initial [ ]  
Last Name [ ] Suffix [ ]  
Social Security Number/  
Taxpayer Identification Number  
(Enter the last 4 digits of your SSN or TIN) [X][X][X][X][ ][ ][ ][ ] Contact Telephone Number [ ] Extension [ ]

2. PROVIDE YOUR CONTRACT NUMBERS (REQUIRED)

TIAA Number [ ][ ][ ][ ][ ][ ][ ][ ][ ] CREF Number [ ][ ][ ][ ][ ][ ][ ][ ][ ]  
Plan Name [ ]

3. ESTABLISH THE DATE OF BIRTH

- I will provide documentation showing record of age (TIAA will not return the records you provide).
  - Birth Certificate - If you have your original birth certificate, you can make a photocopy and send it to us. If you don't have your birth certificate, you can request a copy from the Bureau of Vital Statistics of the city or county in which you were born, then send it to us.
  - Baptismal Certificate - A photocopy of the certificate listing your date of birth (or age) as well as baptismal date.
  - Driver's License or Non-Driver's Identification Card - A photocopy of this document from your state's Division/Department of Motor Vehicles.
  - Marriage Record - A photocopy of your record of marriage listing your date of birth.
  - Military Discharge Paper and Other Military Records - A photocopy of your Military Discharge Paper listing your date of birth. This should be the official discharge paper. Another acceptable military record is a photocopy of the military identification or service card.
  - Passport - A photocopy of the page listing your date of birth.
  - School or College Record (if at least five years old)
- OR
- A notary public or authorized college official will certify my documentation (Continue to Section 4).



**4. CERTIFICATION BY NOTARY PUBLIC OR AUTHORIZED COLLEGE OFFICIAL**  
(ONLY COMPLETE THIS SECTION IF YOU ARE HAVING A NOTARY PUBLIC OR AUTHORIZED COLLEGE OFFICIAL REVIEW YOUR RECORDS AND CERTIFY THE AUTHENTICITY).

In order to establish the correct date of birth for:

**1. Name of Individual**

I hereby certify that I have examined the following records and that the date of birth of the above-named individual is stated therein as shown below. (Give full details under "Type of Record," i.e., Blank Insurance Company Policy # 72897.)

**Type of Record**

Date of Birth (mm/dd/yyyy)

/ / 

Date (mm/dd/yyyy)

How old is this record? / /

If reproduction (photostat, certified copy, etc.) is used, when was it made?

Date (mm/dd/yyyy)

/ / 

Remarks

Please sign in black or dark blue ink. Digital signatures, such as signing with Adobe Acrobat, are not accepted.

Signature of Authorized Employee or Notary Public

Date of Certification (mm/dd/yyyy)

/ / 

Title

Employer



**4. CERTIFICATION BY NOTARY PUBLIC OR AUTHORIZED COLLEGE OFFICIAL  
(CONTINUED)**

In order to establish the correct date of birth for:

**2. Name of Individual**

I hereby certify that I have examined the following records and that the date of birth of the above-named individual is stated therein as shown below. *(Give full details under "Type of Record," i.e., Blank Insurance Company Policy # 72897.)*

**Type of Record**

Date of Birth (mm/dd/yyyy)

 /  / 

Date (mm/dd/yyyy)

How old is this record?  /  / 

If reproduction (photostat, certified copy, etc.) is used, when was it made?

Date (mm/dd/yyyy)

 /  / 

Remarks

Please sign in black or dark blue ink. Digital signatures, such as signing with Adobe Acrobat, are not accepted.

Signature of Authorized Employee or Notary Public

Date of Certification (mm/dd/yyyy)

 /  / 20

Title

Employer



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

**RETURN COMPLETED FORM(S)****Upload your documents easily from your mobile device or computer.**

Use the TIAA mobile app to quickly upload your completed documents. It's as simple as taking a picture:

- Tap the **Message Center** icon in the upper-right corner of your main screen.
- Select the **Files** header and tap **Upload**. That's it!

Haven't downloaded the TIAA mobile app? Get it today in the **App Store** or **Google Play**.

Don't have a smartphone? It's still easy. From your personal computer, here's what you'll need to do:

- Log in to your **TIAA.org** account and select the **Actions** tab.
- Choose **Upload documents** from the options presented.
- Select **Upload Files** and follow the step-by-step instructions.

Faxing a document or using standard or overnight mail are also available, but can take more time. If you prefer one of these methods, use the information provided below to complete the process.

**FAX:**

**800-914-8922** (within U.S.)  
**704-595-5795** (outside U.S.)

**STANDARD MAIL:**

TIAA  
P.O. Box 1268  
Charlotte, NC 28201-1268

**OVERNIGHT:**

TIAA  
8500 Andrew Carnegie Blvd.  
Charlotte, NC 28262

**CHECKLIST**

Did you remember to:

- Complete all necessary personal information.
- Provide your contract numbers.
- Include the record of age documents.
- Have this form signed by an authorized employee or notary public.
- Call TIAA if you have any questions or need assistance at **800-842-2252**.

