



STATE INCOME TAX WITHHOLDING ELECTION INSTRUCTIONS

You reside in a state that allows you to have state income tax withholding on a voluntary basis, therefore, completing this withholding form is optional. However, if you would like to have state income tax withheld from your payments, use this form to indicate that you want state tax withheld according to a specific dollar amount or percentage of the taxable portion of the payment.

Payments that are directly rolled over to an IRA or another retirement plan are not subject to state income tax withholding. Therefore, if your payments are being rolled over, no further action is required.

For cash payments ONLY, please keep in mind:

There may be penalties for not paying enough state income tax during the year, either through withholding or estimated tax payments.

Print in uppercase using black or dark blue ink.

IMPORTANT: A full Social Security Number/Taxpayer Identification Number is required to process your request.

NEED HELP? 800-842-2252

Weekdays

8 a.m. - 10 p.m. (ET)

Saturday

9 a.m. - 6 p.m. (ET)

Or visit TIAA.org.

Have your ID and password ready.

1. PROVIDE YOUR INFORMATION

First Name

Middle Initial

Last Name

Suffix

Social Security Number/
Taxpayer Identification Number

Contact Telephone Number

Extension

State of Legal Residence

Citizenship (if not U.S.)

Please indicate the contract number to which your tax election will apply.

NOTE: The Plan and Sub Plan numbers are for internal use only.

2. PROVIDE YOUR CONTRACT NUMBERS

TIAA Number

CREF Number

Plan Number

Sub Plan Number

Plan Name

Please select the state in which you permanently reside and for which you are requesting voluntary state tax withholding.

3. VOLUNTARY STATE IN WHICH YOU RESIDE

Alabama

Illinois

Missouri

North Dakota

Utah

Arizona

Indiana

Montana

Ohio

West Virginia

Colorado

Kentucky

New Jersey

Pennsylvania

Wisconsin

Connecticut

Louisiana

New Mexico

Rhode Island

Idaho

Minnesota

New York

South Carolina





4. WITHHOLDING ELECTION (CHOOSE ONLY ONE)

- I want the following dollar amount withheld from each payment: \$
- I want the following percentage withheld from the taxable portion of each payment: %
- Do not withhold

5. YOUR SIGNATURE

The form will become effective with your next available payment. You may revoke this election at any time by filing a new state income tax withholding election form with TIAA.

Under penalties of perjury, I certify that: (1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. citizen or other U.S. person; and (4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Note: Item 4 serves no purpose beyond required reproduction of the official Form W-9 language. Please disregard item 4.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Please sign your full legal name with suffix, if applicable, using black or dark blue ink. Digital signatures are not accepted.

Your Signature

Today's Date (mm/dd/yyyy)

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RETURN COMPLETED FORM(S) TO:

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

SEND US YOUR FORM ONLINE:

- Log in to your account at TIAA.org. On the main menu, under "My Account," select the "Upload documents" link.
- Within the "Shared Files" tab in "Message Center," select the "Upload Files" button.

MOBILE UPLOAD:

- Log in to your TIAA app, and click on "Message Center" from the top right menu.
- Click on "Shared Files."
- In the bottom right corner, click on the upload icon and select the folder to upload to.
- Follow the instructions to take a picture and upload your completed form.

