



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)

Or visit [TIAA.org](http://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.)

**Note:** Please indicate the  
contract number to which  
your tax election will apply.  
DO NOT USE DASHES.

## 2. PROVIDE YOUR CONTRACT NUMBERS

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number

TIAA Number

CREF Number





**STATE INCOME TAX**  
**WITHHOLDING ELECTION INSTRUCTIONS**  
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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**

<input type="checkbox"/> Alabama	<input type="checkbox"/> Arizona	<input type="checkbox"/> Colorado	<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois
<input type="checkbox"/> Indiana	<input type="checkbox"/> Kentucky	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Missouri
<input type="checkbox"/> Montana	<input type="checkbox"/> New Jersey	<input type="checkbox"/> New Mexico	<input type="checkbox"/> New York	<input type="checkbox"/> North Dakota
<input type="checkbox"/> Ohio	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina	<input type="checkbox"/> Utah
<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin			

**4. WITHHOLDING ELECTION (CHOOSE ONLY ONE)**

☐ I want the following dollar amount or percentage withheld from each payment:

\$  or  %

☐ 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.

Please sign your full legal name with suffix, if applicable, using black or dark blue ink, or online using TIAA's digital signing experiences. Non-TIAA digital signatures, such as signing with Adobe Acrobat, are not accepted. ►

Your Signature

Today's Date (mm/dd/yyyy)

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## STATE INCOME TAX WITHHOLDING ELECTION INSTRUCTIONS

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

