



# INSTRUCTIONS FOR COMPLETING FORM

## INSTRUCTIONS FOR CERTIFICATE OF EXCEPTION FROM CURRENT TAXATION OF ANNUITY CONTRACTS NOT HELD BY NATURAL PERSONS - NEW YORK

If you qualify for an exception to current taxation of your annuity contract, we need your signature.

If you started your annuity while living in any state other than New York, you will need to download and complete the Certificate of Exception from Current Taxation - All States Except NY form.

You need to print, complete and sign this form to begin your request.

After completing the form, you can return it to us one of three ways: by upload, mail or fax.

### **Upload the completed and signed form through the USAA Mobile App or usaa.com:**

From the USAA Mobile app:

1. Select the profile icon with your initials.
2. Select "Inbox." (Android only)
3. Select "Send documents to USAA."
4. Select "Upload other documents."
5. Follow the screen prompts.

From usaa.com:

1. Log on to your account.
2. Select the profile icon with your initials.
3. Select "Inbox."
4. Select "Send documents to USAA."
5. Select "Upload Documents."
6. Select "Life & Health Insurance/Annuities."
7. Select "Next."
8. Follow the screen prompts.

### **You can also mail to:**

USAA Life Insurance Company of New York  
9800 Fredericksburg Road  
San Antonio, TX 78288

### **Or you can fax to:**

210-498-3243 within the United States  
877-435-7099 from outside the United States

### **Questions?**

Call toll-free in the United States: 800-531-8722