STEP 1: Verify and/or complete the following information to take a distribution from your Investment IRA. If you wish to open a new USAA account to invest distributions, also complete a new account application.

STEP 2: If your distribution requires the sale of securities, either use usaa.com or call us at 800-531-USAA to sell your securities prior to returning this form.

STEP 3: Complete, sign and upload to usaa.com via “My Tools” (Send Documents to USAA) or return by mail.

NOTE: Forms sent via fax will not be accepted.

Personal Information

☐ Residence  ☐ Work  ☐ Cell

USAA Number  Daytime Phone Number (include area code)

First Name  MI  Last Name

Distribution Information (Select One)

☐ Traditional IRA  ☐ Roth IRA  ☐ SEP IRA  ☐ SIMPLE IRA  ☐ BENEFICIARY IRA

USAA Investment IRA

USAA Investment IRA Account Number

Cash Distribution  ☐ Total Distribution OR Partial Distribution: $__________

Stock Distribution

☐ Stock ticker symbol (i.e. XYZ Stocks)  Shares

☐ All Shares

☐ Stock ticker symbol (i.e. XYZ Stocks)  Shares

☐ All Shares

☐ Stock ticker symbol (i.e. XYZ Stocks)  Shares

☐ All Shares

NOTES: For investment accounts, completion of this IRA Distribution Form does not constitute an order to liquidate securities. If your distribution requires the sale of securities, you must either call USAA or use usaa.com to sell your securities. For an investment account, when transferring less than your entire position, shares are distributed based on the tax strategy for your account.

Distribution Reason (Select One)

☐ Normal

I am age 59 ½ or older.

☐ Premature Distribution

I am under age 59 ½ and am not taking a distribution due to disability or part of a series of substantially equal payments. I understand that if the amount distributed is not rolled over into another IRA within 60 days, the amount of the distribution may be included in my gross income subject to taxes and may be subject to an additional 10% premature distribution penalty.

☐ Divorce

I am directing a distribution to be made to my former spouse in accordance with a divorce decree or property settlement agreement entered into as part of the settlement of a divorce action. If my former spouse wishes to maintain an IRA with USAA and does not already have an account, I understand that an IRA Application and Adoption Agreement must be completed by him/her and submitted with this request. The custodian reserves the right to request a certified copy of your divorce decree and/or property settlement prior to disbursement.

☐ Disability

I am disabled, and my physician has determined that my condition can be expected to result in death or to be of long, continued, and indefinite duration.
Distribution Reason (Continued)

☐ Death
An executor, administrator or beneficiary following the death of the IRA account owner is completing this form. A copy of the participant’s death certificate should accompany the form (if not previously provided). If an executor or administrator is completing the form, it should be accompanied by letters of testamentary or letters of administration (if not previously provided).

☐ Rollover
I am directing a distribution to my employer-sponsored retirement plan for my benefit as the participant.

Distribution Instructions

☐ Invest in my existing non-IRA USAA Investment Account ________________________________
☐ Invest in a new USAA non-IRA. A completed and signed application is enclosed.
☐ Send to financial institution below by: ☐ Electronic Funds Transfer (EFT) OR ☐ Domestic Wire ($20 fee)
   For International wires, please call 800-531-USAA to complete your wire request.
   Please verify your EFT or wire instructions with your financial institution. Incorrect information can delay the transmission of funds.
   If you do not make a selection, the distribution will by sent by EFT.
   If the financial institution is not listed with us for this account, please complete the information below.

EFT Authorization for Your Financial Institution

You must be an owner of the account at the other financial institution. You will need to attach a voided check, deposit slip, or financial institution statement with the account number and all owner names preprinted on it.

☐ Checking ☐ Savings

<table>
<thead>
<tr>
<th>Name of Financial Institution</th>
<th>Name of Account Owner(s)</th>
<th>Type of Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit Routing Number (The nine-digit number in lower left corner of check)</td>
<td>Account Number</td>
<td></td>
</tr>
</tbody>
</table>

Account number and all owner names must be preprinted and unaltered.

Tape your voided check or preprinted deposit slip here.

3rd Party EFT Authorization

Complete this section if you are not an owner on the account at the other financial institution. This option ONLY allows you to move money from a USAA Investment account to the outside account.

☐ Checking ☐ Savings

<table>
<thead>
<tr>
<th>Name of Financial Institution</th>
<th>Name of Account Owner(s)</th>
<th>Type of Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit Routing Number (The nine-digit number in lower left corner of check)</td>
<td>Account Number</td>
<td></td>
</tr>
</tbody>
</table>
Wire Instructions

☐ Checking  ☐ Savings

Name of Financial Institution  Name of Account Owner(s)  Type of Account

Transit Routing Number (The nine-digit number in lower left corner of check)  Account Number

Account Owner’s Address  City  State  Zip Code

Wires Only – Further Credit Account Number  Further Credit Name  Additional Details

Check Instructions

☐ Send check to:  ☐ Current mailing address on account  OR  ☐ Payee and address below

Payee

Address  City  State  Zip Code

☐ Other ______________________________

Federal and State Tax Withholding

In general, retirement distributions you receive are subject to federal and, in some states, state income tax. IRS regulations require withholding of federal income taxes from retirement distributions unless you elect not to have withholding apply. If no tax election is made, we are required to withhold 10% of your distribution for Federal Income Tax purposes (excluding Roth IRA distributions).

Federal Tax Withholding Election (Select One)

☐ I DO NOT want to have federal income tax withheld from my retirement plan distribution.

☐ I DO want to have federal income tax withheld from my retirement plan distribution at the rate of _______% or $ ________________ amount (must be at least 10% of the distribution). State tax withholding may also apply to your distribution, depending upon your state of residence.

NOTE: Investment accounts may only select a whole number percentage from 10-99% and not a dollar amount.

State Tax Withholding Election (Select One)

If you reside in certain mandatory withholding state, we are required to withhold state income tax at the rate prescribed by your state (excluding Roth IRA distribution). Some states require an additional form to be completed for your state withholding election. To ensure your distribution request is not delayed by required additional paperwork, if your state has state income tax, please contact USAA to determine the requirements for your state. You may also contact your state or consult with a tax advisor regarding your specific situation.

The state of residence in the legal address on this IRA will determine the state income tax withholding requirements for your distributions.

☐ I DO NOT want to have state income tax withheld from my retirement plan distribution.

☐ I DO want to have state income tax withheld in accordance with the minimum amount or percentage as determined by the requirements of my state of residence. If your state does not provide a minimum percentage no state income tax withholding will be withheld.

☐ I DO want to have state income tax withheld at the rate of _______% (must be higher than the state minimum and must be a whole number).

If no tax is withheld, you may still be subject to federal and state tax on this income. You may also be subject to IRS penalties under rules for estimated tax if your payments of estimated tax and federal/state tax withheld, if any, are not sufficient. Your withholding election will remain in effect until revoked by you.
For your protection, we may require additional verification of your identity and/or instructions before accepting your transaction. The amount of money that you receive will depend on the execution price once we have verified your identity and/or instructions and the order is in proper form. Due to market fluctuations while we obtain verification, the amount you ultimately receive could be less than the amount at the time you initiated this transaction. [If we are unable to reach you to verify this transaction within five days, we may cancel this transaction.] We are not liable for any delayed executions, canceled orders, or requests not acted upon as a result of the verification of your identity and/or instructions.

**Read and Sign**

If I have selected EFT of my distribution by USAA Investment Management Company (the “Sponsor”), I authorize the Sponsor to begin, and the financial institution named to accept, electronic deposits (credits) and withdrawals (debits) to my designated account(s) and to reverse, if necessary, any deposits or withdrawals made in error to my account(s). Automated debit or credit entries shall constitute my receipt for the transaction(s). This authority is to remain in full force and effect until sponsor has received written or phone notification from me of its termination at such time and in such manner as to give Sponsor reasonable opportunity to act on it. I also understand National Financial Services LLC (NFS)/USAA Investment Management Company may purge unused EFT instructions from my investment account(s) on a periodic basis without notice or may terminate the EFT instructions from my investment account(s) at any time in its sole discretion. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law.

Total distributions are subject to $35 fee for investment accounts, except in cases of death, divorce, disability and investing the distribution in other USAA accounts.

Select only one
- [ ] IRA Owner
- [ ] Power of Attorney

or in the event of owner’s death:
- [ ] Beneficiary
- [ ] Executor/Administrator

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Brokerage accounts are introduced and brokerage services provided by USAA Financial Advisors, Inc. (FAI) and USAA Investment Management Company (IMCO), both registered broker-dealers, Members SIPC. Clearing, custody and other services provided by National Financial Services LLC (NFS), Member NYSE, SIPC.