**TIAA-CREF Plan Intake**

Participant/Employee/Retiree Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Alternate Payee/Former Spouse Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please check which type of account/Plan Participant has:**

 Immediate Annuity

 Deferred Annuity

\_\_\_\_\_\_ IRA

\_\_\_\_\_\_ Employer Sponsored Plan

Please identify all TIAA Contract Numbers and CREF Certificate Numbers that are to be divided:

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TIAA Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_ CREF Certificate Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date of Valuation**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Usually DOV is the date of filing of initial pleadings, date of agreement, date Final Order/Divorce is filed, or Date of Transfer (future date)

**Termination/Reaffirmation of Alternate Payee as beneficiary (Choose one):**

\_\_\_\_\_\_\_as of the date of TIAA’s receipt of the QDRO, all TIAA benefits otherwise payable to the Alternative Payee as Beneficiary are payable to the estate of the Participant. The Participant retains the right to change the designation.

\_\_\_\_\_\_\_ Alternate Payee is to be the primary beneficiary for the following percentage of the retirement contract death benefits:

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

TIAA Contract Number: \_\_\_\_\_\_\_\_\_\_\_ - \_\_\_\_% CREF Certificate: \_\_\_\_\_\_\_\_\_\_ - \_\_\_\_%

The Participant:

\_\_\_\_\_retains the right to change these designations

\_\_\_\_\_ does not retain the right to change these designations.

**Additional Forms to Provide:**

* Account Statement as of the date of valuation
* Account Statement as of Date of Marriage if premarital portion is to be reduced from Date of Valuation balance.