



USAA Life Insurance Company
USAA Life Insurance Company of New York

INSTRUCTIONS FOR RETURNING FORMS

You need to print, complete, and sign and date this 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.
2. Select "Inbox" (Android only).
3. Select "Send documents to USAA."
4. Select "Upload documents."
5. Follow the screen prompts.

From usaa.com:

1. Log on to your account.
2. Select the profile icon.
3. Select "Inbox."
4. Select "Send documents to USAA."
5. Follow the screen prompts.

You can also mail to:

USAA Life Insurance Company
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



IRA RECHARACTERIZATION REQUEST

Name: _____ USAA Number: _____
(First, Middle Initial, Last)

1. RECHARACTERIZATION OF CONTRIBUTIONS

Note: Recharacterizations are allowed until the due date of the tax return, including extensions. Accrued earnings will be added to the recharacterization amount.

- ☐ I contributed to my IRA contract number: _____
I now wish to recharacterize a contribution.
- Contribution Amount: \$ _____
Contributed for Tax Year: _____
- ☐ Change the contribution from my Roth IRA to the Traditional IRA below (choose one)
_____ Existing Traditional IRA, contract number _____
_____ New Traditional IRA (application required)
- OR** ☐ Change the contribution from my Traditional IRA to the Roth IRA below (choose one)
_____ Existing Roth IRA, contract number _____
_____ New Roth IRA (application required)

2. SPECIAL INSTRUCTIONS

RECHARACTERIZATION GUIDELINES

We must receive your request for recharacterization by your tax filing deadline, including extensions. Tax consequences may result from the limits and conditions set forth by the Internal Revenue Code and regulations. We do not offer tax advice. We recommend you consult your tax advisor.

AUTHORIZATION

I wish to recharacterize the assets as indicated above. I understand that I am responsible for determining my eligibility to recharacterize within the limits set forth by IRS regulations. I assume full responsibility for this transaction. I understand I must complete and submit my tax return together with IRS Form 8606 to substantiate the recharacterization.

Signature _____

Date _____

USAA LIFE INSURANCE COMPANY 9800 Fredericksburg Road San Antonio, Texas 78288
USAA LIFE INSURANCE COMPANY of NEW YORK Service Center 9800 Fredericksburg Road San Antonio, Texas 78288

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