



P.O. Box 34030
San Antonio, Texas 78265-9933

DIRECT ROLLOVER INSTRUCTIONS

Your USAA IRA is awaiting funding. If you need assistance or have any questions regarding your direct rollover, please call toll-free 1-800-531-8722.

To complete the direct rollover, contact your previous employer's benefits office or plan administrator to get distribution instructions and form(s). Ask your previous employer if it is their policy to send a check to you or directly to the new custodian. Also determine if an account number or signature from USAA is required. Use the following instructions based on your plan's requirements/policies:

Instructions to Present Custodian

- If the form requires an account number, use your USAA member/contract number.
- Have the check made payable to USAA Life Insurance Company or USAA Life Insurance Company of New York, for the benefit of:
 - If the employer sends you the check, please forward it to USAA along with a letter of instruction.
 - If the employer requires a signature from USAA, return your completed plan distribution/rollover request form to USAA and include your USAA member/contract number. We will sign the form and forward it to your employer for processing.
 - If your employer requires a letter of acceptance, please provide this page to your employer or plan administrator along with your distribution form.

If you require wiring instructions, please call toll-free 1-800-531-8722.

Mailing Address

Regular Mail

USAA Life Insurance Company or
USAA Life Insurance Company of New York Service Center
P.O. Box 34030
San Antonio, TX 78265-9933

Overnight

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

Letter of Acceptance:

To whom it may concern:

has requested a direct rollover of retirement assets to USAA Life Insurance Company or USAA Life Insurance Company of New York. **Please make the check payable to:** USAA Life Insurance Company or USAA Life Insurance Company of New York, FBO:

The check may be sent to the participant for delivery to USAA or forwarded directly to:

USAA Life Insurance Company or
USAA Life Insurance Company of New York
P.O. Box 34030
San Antonio, TX 78265-9933

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