



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



ADD SUCCESSOR OWNER OF LIFE INSURANCE

CURRENT CONTRACT INFORMATION

Contract Owner _____ DOB ____ / ____ / ____
Contract Number _____ USAA Number _____ SSN _____
Daytime Phone Number (____) _____ - _____
Insured's Name _____

REVISED CONTRACT INFORMATION As owner of the aforementioned contract, I request the following change(s):

IMPORTANT INFORMATION: Federal law requires us to obtain, verify and record your name, address, date of birth and other information that will allow us to identify you when you open an account and in certain other circumstances.

Successor Owner USAA No. (if available) _____ SSN/TIN _____
Name _____ DOB ____ / ____ / ____

Mailing Address _____ City _____ State _____ Zip Code _____

Physical Address _____ City _____ State _____ Zip Code _____

Required to be completed by successor owner.

Citizenship: ☐ U.S. ☐ Resident Alien ☐ Non-Resident Alien

Specify Country, if other than U.S.: _____

Passport/Alien ID Number: _____

IF SUCCESSOR IS AN ENTITY: (Corporation, Trust, Partnership, etc.)

An Ownership Authorization Form must be submitted to designate individual(s) authorized to exercise ownership rights.

Internal Revenue Service Certification For Beneficiary *Substitute IRS Form W-9*

NOTE: The following certification is required by the Internal Revenue Service (IRS) and does not affect your insurability.

CERTIFICATION: Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); **and**

2. I am not subject to backup withholding either because I have not been notified by the IRS that I am subject to backup withholding as a result of failure to report all interest or dividends, or the IRS has notified me that I am no longer subject to backup withholding (does not apply to real estate transactions, mortgage interest paid, the acquisition or abandonment of secured property, contributions to an Individual Retirement Arrangement (IRA), and payments other than interest and dividends).

Certification instructions. You must cross out item (2) above if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return.

The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

SIGNATURE(S) AS REQUIRED

Current Contract Owner	Date	Successor Owner	Date
Irrevocable Beneficiary (if any)	Date	Collateral Assignee (if any)	Date

Before any contract change request, it is important that you consult your attorney or tax advisor concerning any legal or tax implications.

Ownership

SUCCESSOR OWNER: If the Owner is different from the Insured, a Successor Owner can be named. Upon the death of the Owner, ownership shall pass to the Successor Owner. In the event the Successor Owner is not living at the death of the Owner, ownership passes as set out in the contract.

Irrevocable Beneficiary/Collateral Assignee

If you have designated an Irrevocable Beneficiary on your contract, or if any portion of this contract has been assigned as collateral for a loan, the signature(s) of the Irrevocable Beneficiary and/or Collateral Assignee are required to make a change of ownership. You will find signature lines for an Irrevocable Beneficiary and Collateral Assignee on this form.