

## How to Take a Distribution from your Faculty & Exempt Staff Retirement Plan and/or Supplemental Retirement Plan

What you need to do	TIAA-CREF	FIDELITY	VANGUARD	PRUDENTIAL	AIG SUNAMERICA
1. Contact vendor to discuss the different distribution options they offer and request the paperwork to complete.	<ul style="list-style-type: none"> <li>☐ Call them at 800/842-2276</li> <li>☐ Go to their website at <a href="http://www.tiaa-cref.org">http://www.tiaa-cref.org</a> to research their distribution options and download forms.</li> <li>☐ Schedule a counseling session at the USC Benefits office with a TIAA representative. <a href="http://www.usc.edu/dept/Benefits/events.html">http://www.usc.edu/dept/Benefits/events.html</a></li> <li>☐ Schedule a counseling session with a representative from the Pasadena office by phone at 626/432-6300 OR via the internet, <a href="https://ifs2.tiaa-cref.org/cgi-bin/WebObjects/ARS">https://ifs2.tiaa-cref.org/cgi-bin/WebObjects/ARS</a>.</li> </ul>	<ul style="list-style-type: none"> <li>☐ Call them at 800/343-0860.</li> <li>☐ Go to their website, <a href="http://www.mysavingsatwork.com/atwork.htm">http://www.mysavingsatwork.com/atwork.htm</a>, to review their distribution options and download forms.</li> <li>☐ Schedule a counseling session at the USC Benefits office with a Fidelity representative. <a href="http://www.usc.edu/dept/Benefits/events.html">http://www.usc.edu/dept/Benefits/events.html</a></li> <li>☐ Email <a href="mailto:benefits@usc.edu">benefits@usc.edu</a> to request the distribution form.</li> </ul>	<ul style="list-style-type: none"> <li>☐ Call them at 800/523-1188.</li> <li>☐ Go to their website, <a href="http://www.vanguard.com">http://www.vanguard.com</a> to read about their Lifetime Income program.</li> <li>☐ Schedule a counseling session at the USC Benefits office with a Vanguard representative. <a href="http://www.usc.edu/dept/Benefits/events.html">http://www.usc.edu/dept/Benefits/events.html</a></li> <li>☐ Email <a href="mailto:benefits@usc.edu">benefits@usc.edu</a> to request the distribution form.</li> </ul>	<ul style="list-style-type: none"> <li>☐ Call them at 800/458-6333.</li> <li>☐ Go to their website, <a href="http://www.prudential.com/index/">http://www.prudential.com/index/</a>, to review their distribution options</li> <li>☐ Schedule a counseling session at the USC Benefits office with a Prudential representative. <a href="http://www.usc.edu/dept/Benefits/events.html">http://www.usc.edu/dept/Benefits/events.html</a></li> <li>☐ Email <a href="mailto:benefits@usc.edu">benefits@usc.edu</a> to request the distribution form.</li> </ul>	<ul style="list-style-type: none"> <li>☐ Call them at 877/999-9205</li> <li>☐ Schedule an individual counseling session with one of the vendor representatives through <a href="#">Coming Events</a> on our website. <a href="http://www.usc.edu/dept/Benefits/events.html">http://www.usc.edu/dept/Benefits/events.html</a></li> <li>☐ Email <a href="mailto:benefits@usc.edu">benefits@usc.edu</a> to request the distribution form.</li> </ul>
2. Notarized spousal consent required?*	Yes	Yes	Yes	Yes	Yes
*Note: If your marital status has changed since you left USC, you will need to provide supporting documentation reflecting your new marital status e.g. divorce decree or death certificate. Please contact the Benefits office @ 213.740.6027 for further details.					
3. Send completed forms to the Benefits office to get the employer authorization completed.	Mail OR Fax: USC Benefits 300 S. Grand Ave Suite 1100 Los Angeles, CA 90071 ATTN: Distributions Fax #: 213.437.1853	Mail ONLY: USC Benefits 300 S. Grand Ave Suite 1100 Los Angeles, CA 90071 ATTN: Distributions	Mail OR Fax: USC Benefits 300 S. Grand Ave Suite 1100 Los Angeles, CA 90071 ATTN: Distributions Fax #: 213.437.1853	Mail OR Fax: USC Benefits 300 S. Grand Ave Suite 1100 Los Angeles, CA 90071 ATTN: Distributions Fax #: 213.437.1853	Mail OR Fax: USC Benefits 300 S. Grand Ave Suite 1100 Los Angeles, CA 90071 ATTN: Distributions Fax #: 213.437.1853
4. You may also schedule an appointment to get the employer authorization section completed.	Please contact the Benefits office at 213.437.1835 to schedule an appointment.	Please contact the Benefits office at 213.437.1835 to schedule an appointment.	Please contact the Benefits office at 213.437.1835 to schedule an appointment.	Please contact the Benefits office at 213.437.1835 to schedule an appointment.	Please contact the Benefits office at 213.740.6027 to schedule an appointment.

Once we receive your completed set of forms, we will complete our portion and send it directly onto the retirement vendor for processing. Our turnaround time is typically 48 hours.