



## STUDENT RETIREMENT PLAN FINANCIAL HARDSHIP APPLICATION

1. Call TIAA-CREF to request its Hardship Withdrawal Form.
2. Complete this form (notarize signature), attach the TIAA-CREF Hardship Withdrawal Form, and supporting documentation related to this request.
3. Submit all to Employer Services, 1800 Grant Street, Suite 400, Denver, CO 80203

Name: \_\_\_\_\_ Employee ID: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
 Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
 \_\_\_\_\_ Work Phone: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Postal Code: \_\_\_\_\_

I affirm that I have an immediate and heavy financial need and I am requesting a hardship distribution of my contributions made to university's Student Retirement. The reason for my distribution request is the following (check the appropriate box below):

- Medical expenses (other than amounts paid by insurance) which are incurred by me, my spouse, my dependents, or my primary beneficiary
- Purchase of my principal residence (but not for payment of my mortgage)
- Payment of the next 12 months of post-secondary education tuition and related educational expenses for me, my spouse, my children, my dependents, or my primary beneficiary
- Payment necessary to prevent my eviction from my principal residence or foreclosure on the mortgage of my principal residence
- Funeral or burial expenses for my parent, spouse, child, dependent, or primary beneficiary
- Expenses to repair damage to my principal residence that would qualify for a casualty loss deduction

The total amount of my financial need is \$ \_\_\_\_\_. I am requesting a distribution of \$ \_\_\_\_\_. Attached is the necessary documentation to support my request (i.e., eviction notice, tuition bill, medical bill, etc.). *1. Hardship distributions may only be made from contributions that have been made into the Student Retirement plan, excluding any earnings. 2. Hardship withdrawals are only available from SERP assets that have always been invested in annuities under the SERP. Assets that are, or at any time, have been held in mutual funds under the SERP are not eligible for hardship withdrawal.*

The amount of the hardship distribution may not exceed the amount of the immediate financial need.

I certify that the need **cannot** be met in whole or in part by any of the following:

Through reimbursement or compensation by insurance or otherwise; by other resources; or by other distributions or loans other plans maintained by the university.

I understand that the income tax effect of any distribution is my responsibility to determine and satisfy.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date

Subscribed and sworn to before me on  
This \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

E S USE	Date Received: _____
	Processed by: _____
	<input type="checkbox"/> Received SRA
	<input type="checkbox"/> Terminated TDA Contribution
Reviewed by: _____ Date: _____	