

**Form 4029**  
**Application for Exemption From Social Security and**  
**Medicare Taxes and Waiver of Benefits**  
**(Rev. November 2008)**

**Major Changes**

- On page 1, last bullet before signature, the term “year” was revised to “quarter” per IRC 3127(c)(2).

**Page 2:**

- Under **Where to File**, the addresses for filing applications for exemption and revoking exemptions have been updated per SSA and SB/SE Compliance Services.
- The topic “Effective date of exemption” was revised to address employees and self employed individuals per IRC 1402(g)(2).
- The TPCC address has been updated.
- Under “Instructions to Employers, “Reporting exempt wages,” the second sentence has been modified by adding ...for social security and Medicare tax purposes... at the request of TEGE:EOGE:ET2.

References:

IRC 1402, 3111, 3101, and 3127.  
Forms 941,943, 944, and SS-5