

CURRENT

Withholding Certificate for Pension or Annuity Payments

OMB No. 1545-0074

2016

Form W-4P Department of the Treasury Internal Revenue Service

Purpose. Form W-4P is for U.S. citizens, resident aliens, or their estates who are recipients of pensions, annuities (including commercial annuities), and certain other deferred compensation. Use Form W-4P to tell payers the correct amount of federal income tax to withhold from your payment(s).

Your options depend on whether the payment is periodic, nonperiodic, or an eligible rollover distribution, as explained on pages 3 and 4. Your previously filed Form W-4P will remain in effect if you do not file a Form W-4P for 2016.

What do I need to do? Complete lines A through G of the Personal Allowances Worksheet. Use the additional worksheets on page 2 to further adjust your withholding allowances for itemized deductions, adjustments to income, any additional standard deduction, certain credits, or multiple pensions/more-than-one-income situations.

Sign this form. Form W-4P is not valid unless you sign it.

Future developments. The IRS has created a page on IRS.gov for information about Form W-4P and its instructions, at www.irs.gov/w4p. Information about any future developments affecting Form W-4P (such as legislation enacted after we release it) will be posted on that page.

Personal Allowances Worksheet (Keep for your records.)

- A Enter "1" for yourself if no one else can claim you as a dependent
B Enter "1" if: You are single and have only one pension; or You are married, have only one pension, and your spouse has no income subject to withholding; or Your income from a second pension or a job or your spouse's pension or wages (or the total of all) is \$1,500 or less.
C Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a spouse who has income subject to withholding or more than one source of income subject to withholding.
D Enter number of dependents (other than your spouse or yourself) you will claim on your tax return
E Enter "1" if you will file as head of household on your tax return
F Child Tax Credit (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information.
G Add lines A through F and enter total here. (Note: This may be different from the number of exemptions you claim on your tax return.)

Separate here and give Form W-4P to the payer of your pension or annuity. Keep the top part for your records.

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For Privacy Act and Paperwork Reduction Act Notice, see page 4.

Your first name and middle initial Last name Your social security number Home address (number and street or rural route) City or town, state, and ZIP code Claim or identification number (if any) of your pension or annuity contract

Complete the following applicable lines.

- 1 Check here if you do not want any federal income tax withheld from your pension or annuity. (Do not complete line 2 or 3.)
2 Total number of allowances and marital status you are claiming for withholding from each periodic pension or annuity payment. (You also may designate an additional dollar amount on line 3.)
Marital status: Single Married Married, but withhold at higher Single rate.
3 Additional amount, if any, you want withheld from each pension or annuity payment. (Note: For periodic payments, you cannot enter an amount here without entering the number (including zero) of allowances on line 2.)

Your signature

Date