



Hints: Federal Tax Withholding Form and Your Pension Check

ACERA can withhold federal income taxes from your monthly retirement allowance check. W-4P is the form you use to tell ACERA how much to withhold from your check. Here are some helpful hints for completing form W-4-P for a few different withholding scenarios.

General Instructions

1. Always fill in your first and last name, home address, and city, state, and ZIP.
2. Enter **only the last 4 digits** of your Social Security number.
3. Leave the claim number box blank.
4. Sign and date your form.

If You Don't Want Any Amount For Taxes Taken Out of Your Check

Mark the box next to line 1. Don't mark any other boxes (include the marital status boxes).

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.) X

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.) (Enter number of allowances.)

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 _____

Cat. No. 10225T Form **W-4P** (2016)

If You Want ACERA to Use the Tax Table to Calculate How Much to Withhold From Your Check for Income Taxes

1. You can use the Personal Allowances Worksheet on page 1 of the W-4P form to determine how many allowances to put in the blank next to line 2.
2. In the blank next to line 2, write in a number of allowances. (If you enter 0, we will withhold the highest amount. The higher the number you enter in the blank, the less we're going to withhold.)
3. In line 2, you **MUST** mark one of the three marital status boxes.
4. If you want ACERA to withhold an additional amount on top of what we will already withhold based on the tax tables, enter a dollar amount on line 3. If not, leave line 3 blank.

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.) ▶	<input type="checkbox"/>
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.) ▶	<u>2</u> (Enter number of allowances.)
Marital status: <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> 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.) ▶	<u>\$ 250</u>
Your signature ▶	Date ▶
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If You Want a Flat Dollar Amount Taken Out Your Check

1. Leave the box in line 1 blank.
2. Do not enter an amount in line 2 (do not put in a zero; leave it blank). Do not mark a marital status box in line 2.
3. Write the dollar amount you want withheld from your check in line 3. Write "flat" next to the amount. (If you don't write "flat" ACERA will have to contact you to request another form.)

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.) ▶	<input type="checkbox"/>
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.) ▶	 (Enter number of allowances.)
Marital status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> 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.) ▶	<u>\$ 425 flat</u>
Your signature ▶	Date ▶
Cat. No. 10225T	
Form W-4P (2016)	

Whenever You Want to Change Amount of Withholding

1. Each time you want to change your withholding with ACERA, you must file a new form W-4P. **The new form that you file completely replaces the previous withholding form you filed.** It does not add to the previous form. For example, if ACERA was withholding \$500 from your check, and you file a new form W-4P requesting to withhold an additional \$100, ACERA will begin withholding only \$100 from your check, not \$600.