

Withholding Certificate for Pension or Annuity Payments

2020

Personal Allowances Worksheet (Keep for your records.)

- A** Enter "2" for yourself **A** _____
- B** Enter "1" if you will file as married filing jointly **B** _____
- C** Enter "1" if you will file as head of household **C** _____
- D Child tax credit.** See Pub. 972 for more information.
- If your total income will be less than \$XX,XXX (\$XXX,XXX if married filing jointly), enter "4" for each eligible child.
 - If your total income will be from \$XX,XXX to \$XXX,XXX (\$XXX,XXX to \$XXX,XXX if married filing jointly), enter "2" for each eligible child.
 - If your total income will be from \$XXX,XXX to \$XXX,XXX (\$XXX,XXX to \$XXX,XXX if married filing jointly), enter "1" for each eligible child.
 - If your total income will be higher than \$200,000 (\$400,000 if married filing jointly), enter "-0-" **D** _____
- E Credit for other dependents.** See Pub. 972 for more information.
- If your total income will be less than \$XX,XXX (\$XXX,XXX if married filing jointly), enter "1" for each eligible dependent.
 - If your total income will be from \$XX,XXX to \$XXX,XXX (\$XXX,XXX to \$XXX,XXX if married filing jointly), enter "1" for every two dependents (for example, "-0-" for one dependent, "1" if you have two or three dependents, and "2" if you have four dependents)
 - If your total income will be higher than \$XXX,XXX (\$XXX,XXX if married filing jointly), enter "-0-" **E** _____
- F Other credits.** If you have other credits, see Worksheet 1-6 of Pub. 505 and enter the amount from that worksheet here. If you use Worksheet 1-6, enter "-0-" on lines D and E **F** _____
- G** Add lines A through F and enter the total here **G** _____

For accuracy,
complete all
worksheets
that apply.

- If you plan to **itemize** or **claim adjustments to income** and want to reduce your withholding, or if you have a large amount of other income not subject to withholding and want to increase your withholding, see the **Deductions, Adjustments, and Additional Income Worksheet** on page 5.
- If you **have more than one source of income subject to withholding** or are **married filing jointly and you and your spouse both have income subject to withholding** and your combined income from all sources exceeds \$XX,XXX (\$XX,XXX if married filing jointly), see the **Multiple Pensions/More-Than-One-Income Worksheet** on page 5 to avoid having too little tax withheld.
- If **neither** of the above situations applies, **stop here** and enter the number from line G on line 2 of Form W-4P above.

----- Separate here and give Form W-4P to the payer of your pension or annuity. Keep the worksheet(s) for your records. -----

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▶ For Privacy Act and Paperwork Reduction Act Notice, see page 6.

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

Complete the following applicable lines.

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

Your signature ▶ _____

Date ▶ _____