

# Pension and Annuity Withholding Allowance Certificate

Complete this certificate so that your payer can withhold the correct federal income tax from your pension or annuity payments.

## Step 1: Personal Information

First Name and Middle Initial:

Last Name:

Social Security Number:

Home Address (number and street or rural route):

City, State, and ZIP Code:

Filing Status (Enter: Single, Married filing jointly, or Head of household):

## Step 2: Income From a Job or Multiple Pensions/Annuities (Optional)

Complete this step if you (or your spouse if filing jointly) have a job or more than one pension/annuity.

Enter "Yes" if you have multiple income sources, or leave blank:

## Step 3: Claim Dependent and Other Credits

Number of qualifying children under age 17:

Number of other dependents:

Total credit amount for dependents (\$):

## Step 4: Other Adjustments (Optional)

Other income (not from jobs or pension/annuity payments) (\$):

Deductions other than the standard deduction (\$):

Extra withholding amount per payment period (\$):

## Step 5: Sign and Date

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Payee Signature (Type Name to Sign):

Date (MM/DD/YYYY):