

Withholding Certificate for Pension or Annuity Payments (Form W-4P) Instructions

These are the instructions for completing the Withholding Certificate for Pension or Annuity Payments (Form W-4P) for submission to the Indiana State Teachers' Retirement Fund for processing.

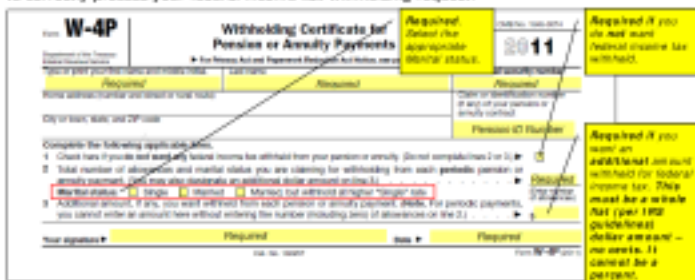
Accessing the Form

This is an IRS form available at <http://www.irs.gov/pub/irs-pdf/w4p.pdf> or from a direct link on the Forms page of the TRF Web site at www.trf.in.gov. This form must be submitted for any of the following reasons:

- To designate federal income tax withholding for periodic payments (monthly benefit payments). This is Item 2 on the form. For nonperiodic payments (withdrawals), 20 percent is automatically withheld if distribution is from the ASA. Lump sum death settlements are taxed at a rate of 10 percent.
- To indicate that no federal income tax is to be withheld. The submitter of the form assumes all tax liability. Check the checkbox for Item 1 on the form.
- To specify an **additional amount** be withheld for federal income tax. This is Item 3 on the form. **Item 2 on the form also must be completed.**

Completing the Form

The areas highlighted in **yellow** are required for the Indiana State Teachers' Retirement Fund to correctly process your federal income tax withholding request.



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

Withholding Certificate for Pension or Annuity Payments
For Federal Income Tax Withholding

Required (Federal Income Tax Withholding)
2011

Optional (Additional Amount)

Required if you do not want Federal income tax withheld

Required if you want an additional amount withheld for federal income tax. This must be a whole dollar (per IRS guidelines dollar amounts - no cents, it cannot be a percent).

Marital status ☐ Single ☐ Married ☐ Married but without spouse (single tax)

Additional amount, if any, you want withheld from each period or annuity payment. Note: For periodic payments, you cannot enter an amount less without entering the number (including zero) of allowances on the 2.

Your signature **Date**

TRF is unable to provide tax advice. If you have questions about your tax liability, contact a tax professional or the Internal Revenue Service (IRS) at (800) 829-1040. IRS hours of operation are Monday – Friday, 7 a.m. – 10 p.m. your local time.