

Whether your annuity payments are subject to state tax withholding depends on the state in which you reside and the withholding elections you make. Please find your residence state- on any of these three pages- and complete the form as directed. If you make an election of any kind, you must complete the Personal Information section at the bottom of page 3 and return the entire form.

**Special note for clergy:** State tax laws generally follow the federal government but you should follow the advice of your own tax advisor in completing this form.

**Please complete personal information below:**

Print Full Name	Social Security Number
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**California residents only:**

Unless you elect otherwise, the law requires that personal income tax be withheld from payments of pensions and annuities.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- I want this designated amount withheld from each distribution: \$\_\_\_\_\_.00. If so, skip to Personal Information on page 3.
- I want withholding from each distribution to be figured using the number of allowances and marital status shown below:

**Marital Status:**     Single or Married (with two or more incomes)  
                               Married (one income)     Head of Household

Number of allowances you are claiming: \_\_\_\_\_  
I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** You cannot enter an amount here without entering the number (including zero) of allowances above.

**Delaware residents only:**

If federal withholding is taken, state withholding should also be taken. If federal withholding is not taken, you may still elect state withholding.

- No. I do not wish to have applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- I want my withholding based on the following marital status and number of allowances: \_\_\_\_\_ (enter total number of allowances).

**Marital Status:**     Single                       Married Filing Joint                       Married withhold at higher single rate

- I want the following flat dollar amount withheld from my monthly annuity: \$\_\_\_\_\_.00.
- I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** You cannot enter an amount here without entering the number (including zero) of allowances above.

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**Georgia residents only:**

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Withholding is required unless you expressly elect otherwise. If no election is made, withholding applies.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- I want withholding from each distribution to be figured using the number of allowances and marital status shown below:

- Marital Status:**
- |  |  |
|--|--|
| <input type="checkbox"/> Single            | <input type="checkbox"/> Married Filing Joint (one spouse working)   |
| <input type="checkbox"/> Head of Household | <input type="checkbox"/> Married Filing Joint (both spouses working) |
|  | <input type="checkbox"/> Married Filing Separate                     |

Number of allowances you are claiming: \_\_\_\_\_

I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** For periodic payments, you cannot enter an amount here without entering the number of allowances and marital status above.

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**Iowa residents only:**

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If federal withholding is taken, state withholding should also be taken. If federal withholding is no taken, you may still elect state withholding. A partial exemption is provided to qualified Iowa residents receiving pensions, annuities, self-employed retirement benefits, deferred compensation and other retirement benefits. To qualify you must be 55 years of age or older, disabled or a surviving spouse or other survivor of an individual who would have qualified for the partial exemption in the tax year. To be considered disabled you must be receiving the retirement income on the basis of a documented disability or you must meet federal or state criteria for disability. Social Security benefits are not covered by this exemption. If you are receiving retirement income from more than one source, you are still entitled to claim only a maximum \$6,000/\$12,000 exemption.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3. **Note:** If the taxable portion of your annual distribution is greater than \$6,000 (\$12,000 married Iowa filers), Iowa tax must be withheld if federal tax is being withheld.
- I choose to have Iowa income tax withheld from my distribution at a rate of 5%. Select one of the following:
  - Claiming no exemptions
  - Exempting \$6,000 in benefits each year
  - Exempting \$12,000 in benefits each year (married status 2, 3 or 4 Iowa filers only)
- I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00.

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**Kansas, Maine, Nebraska and Vermont residents only:**

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If you elected federal withholding to be taken, state withholding will also be taken. If you did not elect federal withholding, you may still elect state withholding.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- I want withholding from each distribution to be figured using the number of allowances and marital status shown below:

- Marital Status:**
- |                                 |                                  |
|---------------------------------|----------------------------------|
| <input type="checkbox"/> Single | <input type="checkbox"/> Married |
|---------------------------------|----------------------------------|

Number of allowances: \_\_\_\_\_ **Note:** For **Maine** residents, the number of allowances cannot be greater than the number of allowances claimed on federal Form W-4 or W-4P. For **Nebraska** residents, we are required to use the mari-

tal status and number of allowances claimed on the federal Form W-4 or W-4P if one is on file.

- I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** You cannot enter an amount here without entering the number (including zero) of allowances above.

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**Massachusetts residents only:**

If federal withholding is taken, state withholding should also be taken. If federal withholding is not taken, you may still elect state withholding.

- No. I do not want to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- Yes. I wish to have applicable state income tax withheld from my distribution.
- Head of Household
  - Blind
  - Spouse is blind and not subject to withholding

Number of exemptions: \_\_\_\_\_

Additional amount withheld, if any: \$\_\_\_\_\_.00.

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**North Carolina residents only:**

If federal withholding is taken, state withholding should also be taken. If federal withholding is not taken, you may elect state withholding unless it is an eligible rollover distribution.

- Check here if you do NOT want any state tax withheld from your annuity. Skip to Personal Information on page 3.
- Total number of allowances and marital status you are claiming for withholding from each annuity payment: \_\_\_\_\_
- Marital Status:**  Single  
 Married or Qualifying Widow(er)  
 Head of Household
- Additional amount, if any, you want withheld from each annuity payment: \$\_\_\_\_\_.00. **Note:** For periodic payments you can enter an amount here without entering the number (including zero) of allowances above.

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**Oklahoma residents only:**

If you elected federal withholding to be taken, state withholding will also be taken. If you did not elect federal withholding, you may still elect state withholding.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information on page 3.
- Total number of allowances and marital status you are claiming for withholding from each annuity payment: \_\_\_\_\_ (enter number of allowances). **Note:** You must enter the number of allowances and the marital status claimed on the federal Form W-4P.

- Marital Status:**  Single  
 Married  
 Married, but withhold at a higher "Single" rate

- I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** You cannot enter an amount here without entering the number (including zero) of allowances above.

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**Oregon residents only:**

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If you elect federal withholding to be taken, state withholding will also be taken. If you did not elect federal withholding, you may still elect state withholding.

- No. I do not wish to have the applicable state income tax withheld from my distribution. If no, skip to Personal Information below.
- Total number of allowances and marital status you are claiming for withholding from each annuity payment:  
\_\_\_\_\_ (enter number of allowances)

**Marital Status:**  Single  Married  Married, but withhold at a higher "Single" rate

- I want the following additional amount withheld from each distribution: \$\_\_\_\_\_.00. **Note:** You cannot enter an amount here without entering the number (including zero) of allowances above.

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**Virginia residents only:**

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If federal withholding is taken, state withholding should also be taken. If federal withholding is not taken, you may still elect state withholding.

- I certify that I am not subject to Virginia withholding, either because I have elected "no withholding" for federal purposes, or I meet the conditions for exemption set forth in the instructions for Form VA-4P. Skip to Personal Information below.
- If subject to withholding, enter your number of personal exemptions:
- a. Subtotal of Personal Exemptions \_\_\_\_\_
- b. Subtotal of Age and Blindness Exemptions \_\_\_\_\_
- Total Exemptions: \_\_\_\_\_
- Additional amount withheld, if any: \$\_\_\_\_\_.00. **Note:** For annuity payments, you cannot enter an amount here without entering the number (including zero) of allowances.
- Voluntary withholding: If you elected "no withholding" for federal purposes, but wish to have Virginia income tax withheld, enter the amount you want withheld from each payment: \$\_\_\_\_\_.00.

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**I understand:**

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1. This payment and any taxes withheld will be reported to me and the appropriate taxing authorities based on the state of residence at the time of distribution.
2. I will receive a Form 1099-R in January of the year following the distribution.

## Personal Information

Print Full Name	Social Security Number	
Address		
Town/City	State	Zip Code
Signature		Date