



State Income Tax Withholding Election Notice for Qualified Pension and Annuity Payments

Instructions: Find your state of residence and complete the form as directed. If you do not return this form, your state's default election must be applied, which may or may not result in an amount withheld. If you make an election, you must sign and complete the Personal Information section.

California residents: If you do not return this form, and Federal income tax is withheld, California state income tax withholding will be equal to 10% of the amount of federal income tax withheld, **or** please select one of the following options:

1. I elect **not** to have income tax withheld from my pension or annuity. *(Do not complete lines 2 or 3)*
2. I want my withholding from each payment to be figured using the number of allowances and marital status shown below:
 - a. Number of Regular Withholding Allowances you are claiming _____
 - b. Number of allowances based upon your Estimated Deductions _____
 - c. Marital Status (check one): Single or Married (with two or more incomes) Married (one income) Head of Household
 - d. Additional Amount (if any) \$ _____ *(Do not complete lines 1 or 3)*
3. I want this designated flat amount withheld from each payment \$ _____. *(Do not complete lines 1 or 2)*

Georgia residents: For periodic payments, state withholding is required if federal taxes are withheld, however you can still elect out. For non-periodic payments, state withholding is voluntary. Complete the following applicable lines:

1. I elect **not** to have state income tax withheld from my pension or annuity. *(Do not complete line 2)*
2. I want my state income tax withholding from each periodic pension or annuity payment to be figured using the number of allowances and marital status shown. Note: Allowances should include personal allowances, additional allowances and dependents. (You may also designate an additional dollar amount on line c).
 - a. Number of allowances: _____
 - b. Marital Status (check one): Single Head of Household Married Filing Separate
 Married Filing Joint (Both Spouses Working) Married Filing Joint (One spouse Working)
 - c. Additional Amount (if any) \$ _____ *(Do not complete line 1)*

Oregon residents: State income tax withholding is required when federal income tax is withheld, unless you elect otherwise. State income tax will not be withheld if the amount is less than \$10.00 per payment.

I elect **not** to have income tax withheld from my payment(s)

PERIODIC PAYMENTS: Withhold state income tax from my pension/annuity payments using the following:

Marital Status (check one): Single Married Head of Household

Number of Exemptions: _____ Additional Amount (if any): \$ _____ **or**

Withhold the following flat amount \$ _____ or whole percent _____ % (you may elect a flat amount or percent only if you have elected out of Federal income tax withholding)

NON-PERIODIC PAYMENTS:

Withhold 8% of the taxable distribution **or**

Withhold the following flat amount \$ _____ or whole percent _____ % (if you have not elected out of Federal income tax withholding, must be at least 8% of the taxable amount of the payment)

PERSONAL INFORMATION – *Must be Completed*

First Name:	MI:	Last Name:	Social Security Number:
Street Address:			Apartment Number:
City:		State:	Zip Code:
Signature:			Date: