

## **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 your payments are initiating and you do not want state income tax withheld, please check the box below and return this form. <u>If you make an election, you must sign and complete the Personal Information section.</u>

\*\* If you are currently receiving payments and want to discontinue state withholding, please check here.

I. VOLUNTARY TAX WITHHOLDING STATES				
Residents of Alabama, Colorado, Indiana, Missouri (must be at least \$10.00). Montana, New Jersey (must be at least \$10.00), New Mexico (must be at least \$10.00), Illinois, Mississippi (must be at least 5%; mandatory for early distributions). New York (must be at least \$5.00), Louisiana, North Dakota, Pennsylvania, Rhode Island, West Virginia, Wisconsin (must be at least \$5.00)  If you want state income tax withheld from your pension or annuity payment, and you reside in one of the states listed above, please indicate a flat amount \$ or whole percent%.				
Arizona residents: If you are receiving a non-periodic payment, or a distribution from an IRA or SEP, state income tax withholding is not applicable. If you are receiving periodic pension or annuity payments and you want state income taxes withheld, please select one of the following:  \[ \begin{array}{c ccccccccccccccccccccccccccccccccccc				
Idaho, Minnesota, and Utah residents: If you want state income tax withheld, complete the following:				
Marital Status (check one): Single Married Married, but withhold at higher Single rate  Number of Exemptions  Additional Amount (if any) \$				
Kentucky and South Carolina residents: If you want state income tax withheld, select one of the following two options:  1. Number of exemptions you are claiming and additional amount you want withheld per payment (if any) \$ OR  2. Flat amount \$ or whole percent % to withhold from each payment.				
Ohio residents: If you want state income tax withheld, select one of the following two options:  1. I want state income tax withheld, based on the following number of exemptions OR  2. I want state tax withheld in the following flat amount \$ or whole percent %. (If you are receiving a non-periodic payment, withholding must be at least 3.5% of the distribution.)				
II. NO TAX WITHHOLDING STATES				
If you reside in one of the following states, do not return this form. State income tax withholding is not permitted. Alaska, Florida, Hawaii, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming				
III. PERSONAL INFORMATION – Must be Completed				
First Name:	MI:	Last Name:		Social Security Number:
Street Address:				Apartment Number:
City:			State:	Zip Code:
Signature:				Date: