



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.

Iowa residents: State income tax of 5% is required if Federal income tax is withheld (see exemptions below). If you do not make an exemption election, a \$6,000 exemption will automatically be applied.

- 1. I have elected out of Federal income tax withholding. Please do **not** withhold state income tax.
- 2. I elect to **HAVE** Iowa income tax withheld from my pension/annuity at a rate of 5%. Select one of the following:
 - Exempting \$6,000 in taxable benefits each year
 - Exempting \$12,000 in taxable benefits each year (joint filers only)
 - Claiming no exemption (If this box is checked, Iowa income tax will be withheld on the entire amount of the taxable benefits received.)

Additional amount (if any), to be withheld from each benefit payment (whole dollars) \$ _____

Nebraska residents: If your payment is an eligible for rollover distribution, subject to mandatory 20% Federal income tax withholding, it's subject to 5% state income tax withholding and you cannot elect out. For other payments, if you have not elected out of Federal income tax withholding you cannot elect out of State income tax withholding. However, you may elect to have State income tax withheld even if no Federal income tax is being withheld. Please select one:

- 1. I am receiving periodic payments, please withhold state income tax based on the following:

Marital Status (check one): Single Married

Number of Exemptions _____

Additional Amount (if any) \$ _____
- 2. I have elected out of Federal withholding. Please withhold state tax in the following flat amount or whole percent
\$ _____ or _____%
- 3. I have elected out of Federal income tax withholding. Please do **not** withhold state income tax.

Oklahoma residents: State income tax withholding is required when federal income tax is withheld, unless you elect otherwise. However, you may elect to have state tax withheld even if no federal taxes are withheld. See the applicable section below.

Do **not** withhold state income tax from my pension payment(s).

PERIODIC PAYMENTS:

- Withhold state income tax from my pension payments using the following:

Marital Status (check one): Single Married Married/Filing Separate

Number of Exemptions _____

Additional Amount (if any) \$ _____

NON-PERIODIC PAYMENTS:

Withhold state income tax in the following flat amount or whole percent (must be at least 5%) \$ _____ or _____%

PERSONAL INFORMATION – *Must be Completed*

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