Withholding Certificate
for Periodic Pension or Annuity Payments

➤ Give Form W-4P to the payer of your pension or annuity payments.

Step 1:
Enter Personal Information

(a) First name and middle initial

(b) Social security number

Address

City or town, state, and ZIP code

(c) □ Single or Married filing separately

□ Married filing jointly or Qualifying widow(er)

□ Head of household (Check only if you’re unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See pages 2 and 3 for more information on each step and how to elect to have no federal income tax withheld (if permitted).

Step 2:
Income From a Job and/or Multiple Pensions/Annuities (Including a Spouse’s Job/Pension/Annuity)

(a) Reserved for future use.

(b) Complete the items below.

(i) If you (and/or your spouse) have one or more jobs, then enter the total taxable annual pay from all jobs, plus any income entered on Form W-4, Step 4(a), for the jobs less the deductions entered on Form W-4, Step 4(b), for the jobs. Otherwise, enter "-0-"... $ 

(ii) If you (and/or your spouse) have any other pensions/annuities that pay less annually than this one, then enter the total annual taxable payments from all lower-paying pensions/annuities. Otherwise, enter "-0-"... $ 

(iii) Add the amounts from items (i) and (ii) and enter the total here... $ 

TIP: To be accurate, submit a 2022 Form W-4P for all other pensions/annuities. Submit a new Form W-4 for your job(s) if you have not updated your withholding since 2019. If you have self-employment income, see page 2.

If (b)(i) is blank and this pension/annuity pays the most annually, complete Steps 3-4(b) on this form. Otherwise, do not complete Steps 3-4(b) on this form.

Step 3: Claim Dependent and Other Credits

Multiply the number of qualifying children under age 17 by $2,000... $ 

Multiply the number of other dependents by $500... $ 

Add other credits, such as foreign tax credit and education tax credits... $ 

Add the amounts for qualifying children, other dependents, and other credits and enter the total here... $ 

Step 4 (optional):
Other Adjustments

(a) Other income (not from jobs or pension/annuity payments). If you want tax withheld on other income you expect this year that won’t have withholding, enter the amount of other income here. This may include interest, taxable social security, and dividends... $ 

(b) Deductions. If you expect to claim deductions other than the basic standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here... $ 

(c) Withholding. Enter any additional tax you want withheld from each payment... $ 4(c) $ 

No Withholding - check this box

Step 5:
Sign Here

Your signature (This form is not valid unless you sign it.)

Date

For Privacy Act and Paperwork Reduction Act Notice, see page 3.