



**Utah Retirement Systems**

PO Box 1590  
Salt Lake City, UT 84110-1590  
801-366-7770 | 800-695-4877

www.urs.org Fax: 801-366-7733

Submit Online: www.urs.org/us/messagecenter

**SUBSTITUTE W-4P**  
**WITHHOLDING CERTIFICATE FOR**  
**PENSION OR ANNUITY PAYMENTS**  
**(Retirement Benefits)**

- INSTRUCTIONS:**
1. Please type or print clearly in black ink.
  2. Read the information on the reverse side before completing this form.
  3. Sign and return to URS.
  4. If you have moved out of state, you might consider not withholding Utah State Tax.

<b>WITHHOLDING CERTIFICATE FOR PENSION OR ANNUITY PAYMENTS</b>												
Name (First, Middle, Last)	Phone Number	Social Security Number										
<p><b>Complete the following applicable lines for Federal and Utah state taxes.</b></p> <p>1. Check here if you <b>do not want any</b> income tax withheld from your pension or annuity. (Do not complete lines 2 or 3.)</p> <p>2. Total number of federal allowances and marital status you are claiming for withholding from each <b>periodic</b> pension or annuity payment. (You may also designate an additional dollar amount on line 3.)</p> <p><b>Marital Status:</b></p> <p><input type="checkbox"/> <b>Single</b></p> <p><input type="checkbox"/> <b>Married</b></p> <p><input type="checkbox"/> <b>Married, but withhold at higher "Single" rate</b></p> <p>3. Additional amount, if any, you want withheld from each pension or annuity payment. <b>Note:</b> You cannot enter an amount here without entering marital status and number of federal allowances on line 2.</p> <p><b>The changes requested on this form will replace any previous tax withholding designations.</b></p>		<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: center; padding: 5px;">Federal</th> <th style="width: 50%; text-align: center; padding: 5px;">Utah State Tax</th> </tr> </thead> <tbody> <tr> <td colspan="2" style="text-align: center; padding: 5px;"><b>Marking these boxes means NO taxes will be withheld</b></td> </tr> <tr> <td style="padding: 5px;">1. <input type="checkbox"/></td> <td style="padding: 5px;"><input type="checkbox"/></td> </tr> <tr> <td style="padding: 5px;">2. _____ (Enter no. of allowances.)</td> <td style="border-left: 1px solid black; padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;">3.\$ _____</td> <td style="border-left: 1px solid black; padding: 5px;">\$ _____</td> </tr> </tbody> </table>	Federal	Utah State Tax	<b>Marking these boxes means NO taxes will be withheld</b>		1. <input type="checkbox"/>	<input type="checkbox"/>	2. _____ (Enter no. of allowances.)		3.\$ _____	\$ _____
Federal	Utah State Tax											
<b>Marking these boxes means NO taxes will be withheld</b>												
1. <input type="checkbox"/>	<input type="checkbox"/>											
2. _____ (Enter no. of allowances.)												
3.\$ _____	\$ _____											
Member's Signature		Date										

**Purpose.** This form is for U.S. citizens, resident aliens, or their estates who are recipients of pensions, annuities, (including commercial annuities), and certain other deferred compensation. Use this form to tell payers the correct amount of federal income tax to withhold from your payment(s). You also may use this form to choose **(a)** not to have any federal income tax withheld from the payment (except for eligible rollover distributions, or payments to U.S. citizens delivered outside the United States or its possessions) or **(b)** to have an additional amount of tax withheld.

**Your previously filed Substitute W-4P will remain in effect if you do not file a Substitute W-4P for 2017.**

**What do I need to do?** Complete lines **A** through **G** of the **Personal Allowances Worksheet** below. Use the additional **Deductions and Adjustments or Multiple Pensions Worksheets** on Form W-4P found on the IRS website at [www.irs.ustreas.gov/formspubs](http://www.irs.ustreas.gov/formspubs) to adjust your withholding allowances for itemized deductions, adjustments to income, certain credits, or multiple pensions/more-than-one-income situations. If you do not want any income tax withheld (see Purpose above), you can skip the worksheets and go directly to page 1 of this form.

**Sign the front of form.** - Substitute Form W-4P is not valid unless you sign it.

<b>Personal Allowances Worksheet</b> (Keep for your records.)	
<b>A</b> Enter "1" for yourself . . . . .	<b>A</b> _____
<b>B</b> Enter "1" if you will file as married filing jointly . . . . .	<b>B</b> _____
<b>C</b> Enter "1" if you will file as head of household . . . . .	<b>C</b> _____
<b>D</b> Enter "1" if: <div style="display: inline-block; vertical-align: middle; margin-right: 10px;"> <ul style="list-style-type: none"> <li>• You're single, or married filing separately, and have only one pension; or</li> <li>• You're married filing jointly, have only one pension, and your spouse has no income subject to withholding; or</li> <li>• Your income from a second pension or a job or your spouse's pension or wages (or the total of all) are \$1,500 or less.</li> </ul> </div>	<b>D</b> _____
<b>E Child tax credit.</b> See Pub. 972, Child Tax Credit, for more information.	
<ul style="list-style-type: none"> <li>• If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "4" for each eligible child.</li> <li>• If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "2" for each eligible child.</li> <li>• If your total income will be from \$175,551 to \$200,000 (\$339,001 to \$400,000 if married filing jointly), enter "1" for each eligible child.</li> <li>• If your total income will be higher than \$200,000 (\$400,000 if married filing jointly), enter "-0-" . . . . .</li> </ul>	
<b>F Credit for other dependents.</b>	<b>F</b> _____
<ul style="list-style-type: none"> <li>• If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "1" for each eligible dependent.</li> <li>• If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "1" for every two dependents (for example, "-0-" for one dependent, "1" if you have two or three dependents, and "2" if you have four dependents).</li> <li>• If your total income will be higher than \$175,550 (\$339,000 if married filing jointly), enter "-0-" . . . . .</li> </ul>	
<b>G Other credits.</b> If you have other credits, see Worksheet 1-6 of Pub. 505 and enter the amount from that worksheet here . . . . .	<b>G</b> _____
<b>H</b> Add lines A through G and enter the total here . . . . .	<b>H</b> _____
<p>For accuracy, complete all worksheets that apply.</p>	<ul style="list-style-type: none"> <li>• If you plan to <b>itemize</b> or <b>claim adjustments to income</b> and want to reduce your withholding, or if you have a large amount of other income and want to increase your withholding, see the <b>Deductions, Adjustments, and Additional Income Worksheet</b>, later.</li> <li>• If you <b>have more than one source of income subject to withholding</b> or are <b>married filing jointly and you and your spouse both have income subject to withholding</b> and your combined income from all sources exceeds \$52,000 (\$24,000 if married filing jointly), see the <b>Multiple Pensions/More-Than-One-Income Worksheet</b> on page 5 to avoid having too little tax withheld.</li> <li>• If <b>neither</b> of the above situations applies, <b>stop here</b> and enter the number from line H on line 2 of Form W-4P above.</li> </ul>