

FEDERAL & MINNESOTA STATE Income Tax Withholding Request

| | |
|-------------------------|---|
| Full Name | |
| Street Address | |
| City, State, & Zip Code | Social Security # XXX-XX- <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Email Address | Home Phone |

Please check if you are providing new contact information above.

| | FEDERAL Choose one of four options: | MINNESOTA ** Choose one of four options: |
|---|--|--|
| 1. Flat Amount <i>This choice means that my tax withholding amount will not be adjusted as my monthly retirement benefit increases.</i> | \$_____ .00 Monthly | \$_____ .00 Monthly |
| 2. Percentage * <i>This choice means that my withholding amount will be adjusted as my monthly benefit increases.</i> | _____ % | _____ % |
| 3. Tax Tables* <i>This choice means that my tax withholding amount will be adjusted as my monthly retirement benefit increases.</i> Current tax tables available on our website at www.sptrfa.org/RetiredMembers/TaxInformation. | <input type="checkbox"/> Single Rate: <input type="text"/> <i>number of allowances</i> | <input type="checkbox"/> Single Rate: <input type="text"/> <i>number of allowances</i> |
| | <input type="checkbox"/> Married Rate: <input type="text"/> <i>number of allowances</i> | <input type="checkbox"/> Married Rate: <input type="text"/> <i>number of allowances</i> |
| 4. No Withholding <i>This choice means that there will be nothing withheld from my monthly benefit.</i> | <input type="checkbox"/> Withhold no Federal tax | <input type="checkbox"/> Withhold no Minnesota tax |

*Taxes are calculated on the taxable portion of your pension.

** If you are no longer a Minnesota resident for income tax purposes, please select the 'Withhold no Minnesota tax' option. SPTRFA cannot withhold taxes for other states.

Signature _____ Date _____

You are responsible for your own tax liability. Please contact a tax professional for withholding advice.