



Department of Management & Budget  
 Office of Retirement Services  
 www.michigan.gov/ors (800) 381-5111  
 P.O. Box 30171  
 Lansing MI 48909-7671

# Federal Income Tax Withholding Authorization

For Pension Recipients

|   |  |                  |
|---|--|------------------|
| RETIREMENT SYSTEM (SELECT ONE): <input type="checkbox"/> PUBLIC SCHOOL EMPLOYEE <input type="checkbox"/> STATE EMPLOYEE <input type="checkbox"/> STATE POLICE <input type="checkbox"/> JUDGES |  |                  |
| MEMBER'S NAME (LAST, FIRST, M.I.)   | HOME PHONE NUMBER<br>( )   | MEMBER ID OR SSN |
| MAILING ADDRESS   | I RECEIVE MORE THAN ONE PENSION PAYMENT.<br><input type="checkbox"/> NO <input type="checkbox"/> YES   |                  |
| CITY, STATE, ZIP CODE   | IF YES, APPLY THIS TAX WITHHOLDING AUTHORIZATION TO:<br><input type="checkbox"/> ALL ACCOUNTS <input type="checkbox"/> ONE ACCOUNT (SPECIFY) _____ |                  |

### What do I need to do?

1. Complete the Withholding Authorization section below. If you don't know how many allowances you can claim or if additional money should be withheld, use the optional worksheets below and on the reverse side.

2. Sign this form and return it to ORS at the address above or fax to (517) 322-1116. This withholding authorization is not valid unless you sign it. It will remain in effect until you file a new one.

## Withholding Authorization (Required)

1. Check here if you **do not want any** federal income tax withheld from your monthly pension. (Do not complete lines 2, 3, or 4)...

2. Total number of allowances you are claiming for withholding from each monthly pension payment. (You may also designate an additional dollar amount on line 4.)..... (Enter allowances.) \_\_\_\_\_

3. What marital status do you want used for withholding? (Required)  Single  Married  Married, but withhold at higher "Single" rate.

4. Dollar amount, if any, you want withheld from each pension payment **in addition to your standard withholding amount.** You cannot request *just* a flat dollar amount. **You must enter a number (including 0) of allowances on line 2 first.**..... \$ \_\_\_\_\_

This change will apply to the pension payment the month after ORS receives this form unless you specify a later month: \_\_\_\_\_

Signature (Required) \_\_\_\_\_ Date \_\_\_\_\_

## Personal Allowances Worksheet (Optional)

**Note:** Use this worksheet to determine how many allowances you can claim for withholding purposes. For the most up-to-date calculations and wage information, refer to IRS Publication 919.

A. Enter "1" for **yourself** if no one else can claim you as a dependent ..... A \_\_\_\_\_

B. Enter "1" if:   
 { • You are single and have only one pension; or   
 • You are married, have only one pension, and your spouse has no income subject to withholding; or   
 • Your income from a second pension or a job, or your spouse's pension or wages (or the total of all) is \$1,500 or less. } ..... B \_\_\_\_\_

C. Enter "1" for your **spouse**. You may choose to enter "-0-" if you are married and your spouse has income subject to withholding or you have more than one source of income subject to withholding. (Entering "-0-" may help you avoid having too little tax withheld.) ..... C \_\_\_\_\_

D. Enter number of **dependents** (other than your spouse or yourself) you will claim on your tax return..... D \_\_\_\_\_

E. Enter "1" if you will file as **head of household** on your tax return. .... E \_\_\_\_\_

F. **Child Tax Credit** (including additional child tax credit):  
 • If your total income will be less than \$61,000 (\$90,000 if married), enter "2" for each eligible child; then **less** "1" if you have three or more eligible children.  
 • If your total income will be between \$61,000 and \$84,000 (\$90,000 and \$119,000 if married), enter "1" for each eligible child plus "1" **additional** if you have six or more eligible children. .... F \_\_\_\_\_

G. Add lines A through F and enter total here. *This may be different from the number of exemptions you claim on your tax return.* ..... G \_\_\_\_\_

For accuracy, **complete all worksheets that apply.** {  
 • If you plan to **itemize or claim adjustments to income** and want to reduce your withholding, see the **Deductions and Adjustments Worksheet** on the back of this form.  
 • If you have more than one source of income subject to withholding or a spouse with income subject to withholding **and** your combined income from all sources exceeds \$40,000 (\$25,000 if married), see the **Multiple Pensions/More-Than-One-Income Worksheet** on the back to avoid having too little tax withheld.  
 • If **neither** of the above situations applies, **stop here** and enter the number from line G on line 2 in the above Withholding Authorization section.



