



**FEDERAL INCOME TAX Substitute Form W-4P**  
**Withholding Certificate for Pension or Annuity Payment**

**SECTION 1 - RETIREE INFORMATION (Required Section)**

PENSION PLAN (Choose One)

- Board of Education
- Fire
- General Employees
- Police

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
(Last) (First) (MI)

Daytime Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
(Street) (City) (State) (Zip Code)

**SECTION 2 - FILING STATUS (Required Section)**

Indicate your tax filing status used on your annual tax return.

- FILING STATUS:  Single or Married Filing Separately  Married Filing Jointly  Head of Household

If you want no taxes withheld, check below.

No withholding - do not withhold any Federal Income tax from my monthly benefit  
----- IF NO WITHHOLDING SELECTED, SKIP SECTIONS 3 & 4 -----

**SECTION 3 - OTHER INCOME, DEPENDENT CREDITS, AND DEDUCTIONS (Optional Section)**

This section is optional. Skip this section unless you want to withhold for taxes due on income besides your City of Atlanta pension or you want to reduce your pension by credits so your tax withholding is less than the standard amount.

1. \$ \_\_\_\_\_ .00 Other annual income (not including your City of Atlanta pension)
2. \$ \_\_\_\_\_ .00 Dollar Amount of credits for dependents
3. \$ \_\_\_\_\_ .00 Dollar Amount of other deductions/credits

OPTIONAL

**SECTION 4 - ANY ADDITIONAL WITHHOLDING (Optional Section)**

Extra Withholding (Optional)

\$ \_\_\_\_\_ Withhold this ADDITIONAL amount from each monthly pension payment

**SECTION 5 - SIGNATURE (Required Section)**

Signature \_\_\_\_\_ Date \_\_\_\_\_

# FEDERAL INCOME TAX

## Withholding Certificate for Pension or Annuity Payments

Caution: Specific questions regarding the withholding of Federal income tax should be directed to the person who prepares your tax return or to the Internal Revenue Service (IRS). The toll free number for the IRS is 1-800-829-1040. Remember that there are penalties for not paying enough tax during the year, either through withholding or estimated tax payments. Pub. 505 (available from IRS) explains the estimated tax requirements and penalties in detail.

### SECTION 3 INSTRUCTIONS

Skip this section unless you want to withhold for taxes due on other income besides your City of Atlanta pension or you want to reduce your pension by credits so your tax withholding is less than the standard amount.

1. Include an additional income dollar amount only if you want to withhold for taxes due on other income besides your City of Atlanta pension.
2. Include a dependent credit dollar amount if you claim dependents on your tax return and want your tax withholding on your pension to be less than the standard amount.
3. Include an additional credit dollar amount if you claim deductions other than the basic standard deduction on your tax return and you want your tax withholding on your pension to be less than the standard amount.

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Your choice is effective until you complete a new form. You may change your tax withholding election at any time. For a change to be effective for a particular month, the request must be received by the 10th of the month.

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### WITHHOLDING ESTIMATORS

The two websites below provide tools that you may use to estimate the federal tax to be withheld from your pension payment based on your tax table elections completed on the attached form. Please note that while these and other similar websites are available to assist you, neither the City of Atlanta nor Strategic Benefits Advisors, Inc. is responsible for these websites or the results that they produce.

[paycheckcity.com/calculator/salary/georgia](http://paycheckcity.com/calculator/salary/georgia)  
[adp.com/resources/tools/calculators/salary-paycheck-calculator.asp](http://adp.com/resources/tools/calculators/salary-paycheck-calculator.asp)

City of Atlanta Pension Center  
2472 Jett Ferry Rd, Ste 400-410  
Atlanta, GA 30338  
Phone (888) 594-0216  
Fax (866) 201-5033  
coa.sba-inc.com