



Utah Retirement Systems
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 www.urs.org

Request for State of Utah Income Tax Withholding for URS Retirement Benefits

- INSTRUCTIONS:**
1. Use this form to designate your withholding of State of Utah income tax from your monthly retirement allowance or a lump-sum payment.
 2. If this form is not returned, or returned incomplete, no State of Utah income tax will be withheld from the monthly retirement allowance or a lump-sum payment.
 3. If the completed form is received by the 12th of the month, it will be applicable for the next monthly retirement allowance.
 4. For federal tax withholding, refer to the Internal Revenue Service (IRS) *Form W-4P for Periodic Pension or Annuity Payments* and (IRS) *Form W-4R for Nonperiodic Payments and Eligible Rollover Distributions*.
 5. URS will only withhold state income tax for the State of Utah.
 6. Type or print in black or blue ink.

SECTION A » MEMBER INFORMATION		
Name (First, Middle, Last)	Primary Phone Number	Account # or Last Four Digits of Social Security #

SECTION B » WITHHOLDING CERTIFICATION	
<p>Complete the following applicable lines for State of Utah income tax withholding.</p> <p>Important Note: If this form is not returned, or returned incomplete, <u>no</u> State of Utah income tax will be withheld from the monthly retirement allowance or a lump-sum payment.</p>	
<p>1. Check here if you do not want any State of Utah income tax withheld from your monthly retirement allowance or a lump-sum payment. (Do not complete lines 2 or 3.)</p>	<p>1. <input type="checkbox"/></p>
<p>2. Filing status you are claiming for withholding from your monthly retirement allowance or a lump-sum payment. (You may also designate an additional amount on line 3.)</p> <p>Filing Status:</p> <p><input type="checkbox"/> Single</p> <p><input type="checkbox"/> Married</p> <p><input type="checkbox"/> Married, but withhold at higher "Single" rate</p>	
<p>3. Additional amount, if any, you want withheld from your monthly retirement allowance or a lump-sum payment. Note: You cannot enter an amount here without entering a filing status on line 2.</p>	<p>3. \$ _____</p>
<p>The changes requested on this form will replace any previous State of Utah income tax withholding designations.</p>	

SECTION C » SIGNATURE	
<p><u>By signing and submitting this form I certify, understand, and acknowledge the following:</u></p> <p>» I am submitting this form to designate my withholding of State of Utah income tax from my URS monthly retirement allowance or a lump-sum payment;</p> <p>» URS has not provided legal or tax advice and I should consult with my own legal counsel or tax advisor regarding the withholding election provided on this form;</p> <p>» I am responsible for any income tax and/or penalties assessed by state tax authorities for the withholding election I have made;</p> <p>» The information provided on this form is true, correct, and complete to the best of my knowledge; and</p> <p>» I authorize URS to withhold State of Utah income tax as selected in the applicable section(s).</p>	
Member's Signature	Date