

Retirement Benefit Payment Services
State Income Tax Withholding Election

Participant Name: _____ Social Security Number _____
 Address 1 _____
 Address 2 _____
 City, State Zip _____

Part 1 – Legal Residence

My legal residence is the same as the mailing address printed above.

My legal residence is as follows:

Part 2 – State Income Withholding Election Information contained here is subject to change and should be used in conjunction with the applicable state tax laws. This document will not substitute for the advice of a tax advisor. For the most current state tax information, consult your tax advisor or your state revenue department.

Residents of . . .	Your Election
Alaska (AK) Florida (FL) Hawaii (HI) Nevada (NV) New Hampshire (NH) South Dakota (SD) Tennessee (TN) Texas (TX) Washington (WA) Wyoming (WY)	State income tax withholding is not required nor allowed. Please sign form and return.
Pennsylvania (PA)	PA state tax withholding is not offered. Please sign form and return.

<p> Connecticut (CT) Illinois (IL) Indiana (IN) Maryland (MD) Michigan (MI) Missouri (MO) Montana (MT) New Jersey (NJ) New Mexico (NM) New York (NY) North Dakota (ND) </p>	<p>State income tax withholding is voluntary. If you want state income tax withheld, you must provide the amount to withhold.</p> <ul style="list-style-type: none"> ▪ ND, IL – You may elect any dollar amount to be withheld. ▪ CT, NJ – Only whole dollar amounts may be withheld and withholding amount must be at least \$10.00 ▪ IN, MO, MT, NM – Withholding amount must be at least \$10.00 ▪ MI, NY – Only whole dollar amounts may be withheld and withholding amount must be at least \$5.00 ▪ MD – Withholding amount must be at least \$5.00. Residents <i>cannot</i> elect out of mandatory state tax withholding if an eligible rollover distribution is not rolled over. In this case, 7.75 % of the gross distribution will be withheld for state taxes. <p><u>YOUR ELECTION:</u></p> <p><input type="checkbox"/> I do not want state income tax withheld.</p> <p><input type="checkbox"/> I elect to have the following amount withheld:</p> <p style="text-align: center;">\$ _____ <i>(enter amount)</i></p>
<p> Alabama (AL) Colorado (CO) District of Columbia (DC) Idaho (ID) Kentucky (KY) Louisiana (LA) Minnesota (MN) Mississippi (MS) Ohio (OH) Rhode Island (RI) South Carolina (SC) Utah (UT) West Virginia (WV) Wisconsin (WI) </p>	<p>State income tax withholding is voluntary. If you want state income tax withheld, you must provide a valid election.</p> <p><u>YOUR ELECTION:</u></p> <p><input type="checkbox"/> I do not want state income tax withheld.</p> <p><input type="checkbox"/> I elect to have state income tax withheld as follows:</p> <p style="margin-left: 40px;">Marital status: <input type="checkbox"/> Married <input type="checkbox"/> Single</p> <p style="margin-left: 40px;">Allowances: _____</p> <p style="margin-left: 40px;">Additional Amount: \$ _____</p>
<p>Arizona (AZ)</p>	<p>State income tax withholding is voluntary. If you want state income tax withheld, you must provide the percentage of federal income tax you would like withheld for state income tax. Note: State tax will <i>not</i> be withheld from lump sum payments.</p> <p><u>YOUR ELECTION:</u></p> <p><input type="checkbox"/> I do not want state income tax withheld.</p> <p><input type="checkbox"/> I elect to have the following fixed percentage of my federal income tax withheld for state income tax:</p> <p style="margin-left: 40px;"><input type="checkbox"/> 10.7% <input type="checkbox"/> 20.3% <input type="checkbox"/> 24.5%</p> <p style="margin-left: 40px;"><input type="checkbox"/> 26.7% <input type="checkbox"/> 33.1% <input type="checkbox"/> 39.5%</p>

<p>Delaware (DE) Iowa (IA) Kansas (KS) Maine (ME) Massachusetts (MA) Nebraska (NE) Oklahoma (OK)</p>	<p>State income tax withholding is mandatory if you elect to have federal income tax withheld. If you do not want state income tax withheld, you must elect to have no federal tax withheld on Federal Tax Form W-4P.</p> <p><u>YOUR ELECTION:</u></p> <p><input type="checkbox"/> I do not want state income tax withheld and I have elected not to have Federal Tax withheld.</p> <p><input type="checkbox"/> DE, KS, OK, MA: I elect to have state tax withheld as follows:</p> <p style="padding-left: 40px;">Marital status: <input type="checkbox"/> Married <input type="checkbox"/> Single</p> <p style="padding-left: 40px;">Allowances: _____</p> <p style="padding-left: 40px;">Additional Amount: \$ _____</p> <p><input type="checkbox"/> IA: I elect to have 5% withheld. I would also like additional withholding of: \$ _____. (Additional withholding is optional.)</p> <p><input type="checkbox"/> ME, NE: State withholding is based on your federal tax election. Check this box to have state tax withheld.</p>
<p>Arkansas (AR) California (CA) Georgia (GA) North Carolina (NC) Oregon (OR) Vermont (VT) Virginia (VA)</p>	<p>State income tax withholding is mandatory <i>unless you specifically elect to no withholding.</i></p> <ul style="list-style-type: none"> ▪ AR: Residents cannot elect out of mandatory 5% state tax withholding if an eligible rollover distribution is not rolled over. This is for non-periodic (eligible rollover distribution) distributions only. ▪ VA: Residents can only elect no withholding if (a) the same choice was made for federal purposes, (b) recipient is a nonresident, (c) recipient expects to have no tax liability, or (d) recipient's adjusted gross income is less than \$7,000 if single, \$14,000 if married. Residents cannot elect out of mandatory 4% state tax withholding if an eligible rollover distribution is not rolled over. <p><u>YOUR ELECTION:</u></p> <p><input type="checkbox"/> I do not want state income tax withheld.</p> <p><input type="checkbox"/> I elect to have state tax withheld as follows:</p> <p style="padding-left: 40px;">Marital status: <input type="checkbox"/> Married <input type="checkbox"/> Single</p> <p style="padding-left: 40px;">Allowances: _____</p> <p style="padding-left: 40px;">Additional Amount: \$ _____</p>

Part 4 – Authorization

I, the undersigned, hereby certify that my legal residence in Part 1 is accurate and I authorize state taxes to be withheld as indicated on this form. I understand the information presented on this form is for informational purposes only and is not intended as tax advice.

Signature: _____ Date: _____