



## Tax Withholding Election for Death Benefits

Substitute for IRS Form W-4R. To be used by estates, estate representatives, and other organizations.

\_\_\_\_\_, Deceased

Pensioner's SSN:

\_\_\_\_\_  
Name of Individual OR Name of Organization

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Your Social Security Number or Taxpayer Identification Number

### Income Tax Withholding Election

For nonperiodic payments, the default withholding rate is 10%. You can choose to have a different rate by entering a rate between 0% and 100% below. Generally, you can't choose less than 10% for payments to be delivered outside the United States and its possessions.

Check one:

- ☐ I elect to have the default withholding rate of **10%** withheld from my benefit payment.
- ☐ I elect to have **NO** federal income tax withheld from my benefit payment.
- ☐ I elect to have a nonstandard withholding rate that is between 0% and 100%. The rate I elect is:  
\_\_\_\_\_.

*I understand that if I elect not to have federal income tax withheld, I am still liable for payment of federal income tax on any taxable portion of my distribution and that regardless of my election, I may still be responsible for estimated tax payments if any amount withheld is not sufficient to meet my federal income tax obligations.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**PLEASE RETURN THIS FORM IN THE ENCLOSED ENVELOPE**



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