



Federal Income Tax Withholding Election

Substitute for IRS Form W-4P

Applicant:		MW Funds ID:	
Step 1: Election	<p>A. ___ I do not want to have federal income tax withheld from my monthly pension check.</p> <p>B. ___ I want to have federal income tax withheld from my monthly pension check.</p> <p>For tax purposes I am:</p> <p><input type="checkbox"/> Single or Married filing separately</p> <p><input type="checkbox"/> Married filing jointly or a Qualifying widow(er)</p> <p><input type="checkbox"/> Head of household (<i>check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.</i>)</p>		
Complete Steps 2, 3, and 4 only if they apply to you. Do not complete these steps if you checked Box A in Step 1. Otherwise, skip these and sign the form.			
Step 2: Income From a Job and/or Multiple Pensions/ Annuities (including a spouse's)	<p>Complete this step if you (1) receive income from a job or more than one pension/annuity, or (2) are married filing jointly and your spouse receives income from a job or a pension/annuity.</p> <p>If you (and/or your spouse) have one or more jobs, then enter the total taxable annual pay from all jobs, plus any income entered on Form W-4, Step 4(a), for the jobs, less the deductions entered on Form W-4, Step 4(b), for the jobs. Otherwise, enter "-0-"</p> <p><input type="checkbox"/> \$ _____</p> <p>If you (and/or your spouse) have any other pensions/annuities that pay less annually than this one, then enter the total annual taxable payments from all lower-paying pensions/annuities. Otherwise, enter "-0-"</p> <p><input type="checkbox"/> \$ _____</p>		
Step 3: Claim Dependents and Other Credits	<p>If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):</p> <p>Multiply the number of qualifying children under age 17 by \$2,000 <input type="checkbox"/> \$ _____</p> <p>Multiply the number of other dependents by \$500 <input type="checkbox"/> \$ _____</p> <p>Add other credits, such as foreign tax credit and education tax credits <input type="checkbox"/> \$ _____</p>		
Step 4 (optional): Other Adjustments	<p>(a) Other income (not from jobs or pension/annuity payments). If you want tax withheld on other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, taxable social security, and dividends. <input type="checkbox"/> \$ _____</p> <p>(b) Deductions. If you expect to claim deductions other than the basic standard deduction and want to reduce your withholding, use the IRS Deductions Worksheet and enter the result here. <input type="checkbox"/> \$ _____</p> <p>(c) Extra withholding. Enter any additional tax you want withheld from each payment. <input type="checkbox"/> \$ _____</p>		

Signature (This form is not valid unless you sign it.)

Date



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