

STATE INCOME TAX WITHHOLDING

STATE TAX IS MANDATORY FOR THE FOLLOWING STATES WHEN THERE IS FEDERAL TAX ELECTION:

Arkansas, Connecticut, Delaware, Iowa, Kansas, Maine, Maryland, Massachusetts, Mississippi, Nebraska, North Carolina, Oklahoma, Vermont, Virginia, and Washington DC

STATE TAX IS MANDATORY WHEN THERE IS A FEDERAL TAX ELECTION UNLESS THE PAYEE ELECTS OUT FOR THE FOLLOWING STATES: California, Connecticut, Georgia, Michigan, and Oregon

Withholding State: _____

Please check the appropriate box:

A. ☐ Please check here if you **do not want** any state income tax withheld from your pension or annuity.

B. ☐ Fixed monthly dollar amount: \$ _____

C. ☐ Please calculate and withhold:

Marital Status: ☐ Single ☐ Married

Number of allowances: _____

Additional amount (if any) \$ _____

Please contact your tax or legal adviser to determine your income tax withholding requirements. If you have chosen a withholding option that is not supported by the mandatory withholding requirements of your state, the mandatory withholding requirement will be used in calculating your state income tax deduction.

RECIPIENT INFORMATION (please print clearly)

Participant Name _____ Gender ☐ Male ☐ Female

Participant Social Security No. _____

No. and Street _____ ☐ Apt _____ ☐ Unit _____ ☐ Suite _____ ☐ Floor _____

City _____ State _____ ZIP _____

Area Code and Telephone No. _____ Email Address _____

Participant Signature _____ Date _____

Please complete and return this form by email, fax or mail as indicated below:

Email



retirement@aftraretirement.org

Fax



Fax: (212) 499-4928

Mail



AFTRA Retirement Fund
Retirement Services Department
261 Madison Avenue, 7th Floor
New York, NY 10016