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# Federal withholding allowance worksheet

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes. Current Revision Recent Developments Additional Guidance for Substitute Submissions of Form W-4 -- 29-NOV-2022 Other Items You May Find Useful All Form W-4 Revisions FAQs on the Form W-4 -- 11-Dec-2019 IRS Tax Withholding Estimator About Form W-4P, Withholding Certificate for Periodic Pension or Annuity Payments About Form W-4R, Withholding Certificate for Nonperiodic Payments and Eligible Rollover Distributions About Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens About Publication 15-A, Employer's Supplemental Tax Guide, (Supplement to Pub. 15, Employer's Tax Guide) About Publication 15-T, Federal Income Tax Withholding Methods About Publication 501, Exemptions, Standard Deduction, and Filing Information About Publication 505, Tax Withholding and Estimated Tax Other Current Products Page Last Reviewed or Updated: 25-Apr-2023 A withholding allowance refers to an exemption that reduces how much income tax an employer deducts from an employee's paycheck.



In practice, employees in the United States use Internal Revenue Service (IRS) Form W-4: Employee's Withholding Certificate to calculate and claim their withholding allowance. A withholding allowance is an exemption that reduces how much income tax an employer deducts from an employee's paycheck. Internal Revenue Service (IRS) Form W-4 is used to calculate and claim withholding allowances. The amount of withholding is based on a taxpayer's filing status—single or married but filing separately, married and filing jointly, or head of household—and the number of withholding allowances they claim. The more allowances you claim, the less income tax will be withheld from a paycheck, and vice versa. Individuals need to file a new Form W-4 whenever their personal or financial situation changes. When an individual is hired at a firm, they are required to fill out Form W-4, which includes personal information, such as their name and Social Security number. It also includes the number of allowances to be made.

## Illinois Withholding Allowance Worksheet

**General Information**  
Complete this worksheet to figure your total withholding allowances.  
Everyone must complete Step 1.  
Complete Step 2 if:  
• you (or your spouse) are age 65 or older or legally blind, or  
• you wish an amount similar to the Deductions and Adjustments Worksheet for federal Form W-4.

If you have more than one job or your spouse works, you should figure the total number of allowances you are entitled to claim. Your withholding usually will be more accurate if you claim all of your allowances on the Form IL-W-4 for the highest-paying job and claim zero on all of your other IL-W-4 forms. You may reduce the number of allowances or request that your employer withhold an additional amount from your pay, which may help avoid having too little tax withheld.

### Step 1: Figure your basic personal allowances (including allowances for dependents)

- Check all that apply:
- No one else can claim me as a dependent.
  - I can claim my spouse as a dependent.
- 1 Write the total number of boxes you checked. **1**
- 2 Write the number of dependents (other than you or your spouse) you will claim on your tax return. **2**
- 3 Add Lines 1 and 2. Write the result. This is the total number of basic personal allowances to which you are entitled. **3**
- 4 If you want to have additional Illinois Income Tax withheld from your pay, you may reduce the number of basic personal allowances or have an additional amount withheld. Write the total number of basic personal allowances you elect to claim on Line 4 and on Form IL-W-4, Line 1. **4**

### Step 2: Figure your additional allowances

- Check all that apply:
- I am 65 or older.
  - My spouse is 65 or older.
  - I am legally blind.
  - My spouse is legally blind.
- 5 Write the total number of boxes you checked. **5**
- 6 Write any amount that you reported on Line 4 of the Deductions and Adjustments Worksheet for federal Form W-4 plus any additional Illinois subtractions or deductions. **6**
- 7 Divide Line 6 by 1,000. Round to the nearest whole number. Write the result on Line 7. **7**
- 8 Add Lines 5 and 7. Write the result. This is the total number of additional allowances to which you are entitled. **8**
- 9 If you want to have additional Illinois Income Tax withheld from your pay, you may reduce the number of additional allowances or have an additional amount withheld. Write the total number of additional allowances you elect to claim on Line 9 and on Form IL-W-4, Line 2. **9**

Note: If you have non-wage income and you expect to owe Illinois Income Tax on that income, you may choose to have an additional amount withheld from your pay. On Line 3 of Form IL-W-4, write the additional amount you want your employer to withhold.

Illinois Department of Revenue  
**IL-W-4 Employee's Illinois Withholding Allowance Certificate**

Social Security number: \_\_\_\_\_ 1 Write the total number of basic allowances that you are claiming (Step 1, Line 4, of the worksheet), **1**

Name: \_\_\_\_\_ 2 Write the total number of additional allowances that you are claiming (Step 2, Line 8, of the worksheet), **2**

Street address: \_\_\_\_\_ 3 Write the additional amount you want withheld (deducted) from each pay, **3**

City: \_\_\_\_\_ State: \_\_\_\_\_ Date: \_\_\_\_\_

Check the box if you are exempt from federal and Illinois Income Tax withholding and sign and date the certificate.  Your signature: \_\_\_\_\_

Employer: Keep this certificate with your records. If you have referred the employee's federal certificate to the IRS and the IRS has notified you to disregard it, you may also disregard this certificate. Even if you are not required to refer the employee's federal certificate to the IRS, you may want to disregard this certificate to the Illinois Department of Revenue for the Illinois Income Tax Regulations 89 Ill. Admin. Code 100.7110.

IL-W-4 (9-12-18) **Reset** **Print**

Once the information is completed, the employer then uses the W-4 information to determine how much of an employee's pay to subtract from their paycheck to remit to the tax authorities. The total number of allowances claimed is important—the more tax allowances claimed, the less income tax will be withheld from a paycheck; the fewer allowances claimed, the more tax will be withheld. [essential-hematology.pdf free download](#) The amount of withholding is based on filing status—single or married but filing separately, married and filing jointly, or head of household—and the number of withholding allowances claimed on the W-4. It is important to determine the right number of allowances to claim. This is to avoid trouble when filing taxes or to keep from giving the government an interest-free loan by paying too much in taxes only to receive the amount back later. The IRS provides a rough formula for how many allowances taxpayers should claim to have the correct amount withheld from each paycheck. The withholding allowances relate to whether the individual has multiple jobs or a spouse who works, if they can claim dependents, and any other adjustments. A withholding allowance could be based, for example, on whether the taxpayer can claim the Child Tax Credit for a qualifying child (or a dependent who is not a qualifying child), whether they itemize personal deductions instead of claiming the standard deduction, whether they or their spouse has more than one job, and what their total income is. Personal exemptions, which have been eliminated by the Tax Cuts and Jobs Act for 2018 through 2025, are no longer taken into account in figuring withholding allowances. If the employee is single with no children and takes the standard deduction, they can claim one withholding allowance for themselves and a second if they are single with only one job, for a total of two. If, on the other hand, the taxpayer is married filing jointly with no children and claims the standard deduction, they can claim one for themselves, one for their spouse, and a third if they have only one job, if that spouse doesn't work, or if their second job or the spouse's job brings in \$1,500 or less. With children or other dependents, it gets more complicated, and the number of allowances claimable is income-based. Fortunately, employees can check their withholding choice using the IRS Withholding Calculator. This enables them to see whether they've claimed the right number of withholding allowances. The IRS Withholding Calculator can help employees determine how many withholding allowances they can claim. An individual can be exempt from a withholding allowance, but it's not easy to receive that status. You can claim the withholding exemption only if you had a right to a refund of all federal income tax withheld in the prior year because you didn't have any tax liability and you expect the same for the current year. You simply write "Exempt" on Form W-4. This must be done annually; the exemption doesn't automatically carry over. A new Form W-4 must be filed with the taxpayer's employer whenever their personal or financial situation changes (e.g., they get married, have a baby, or their spouse enters or leaves the workplace). The new withholding allowances go into effect no later than the first payroll period ending 30 days after giving the revised form to the employer. The employer may implement it sooner but isn't required to do so. A new Form W-4 should be filed whenever personal or financial situations change and must go into effect within the first payroll period ending 30 days after the revised form is sent to the employer. It's also possible to request that a specific dollar amount be withheld, regardless of withholding allowances. This may be helpful for taxpayers receiving a year-end bonus or for those who are consistently overpaid. Withholding on investment income, such as capital gain distributions made at the end of the year. Individuals can also request that an additional amount be withheld with Form W-4. If you claim more allowances than you are entitled to, you are likely to owe money at tax time. If claiming too many allowances results in you significantly underpaying your taxes during the course of the year, you may have to pay a penalty when you file your annual tax return. If, after claiming zero allowances, you find that you do not have enough withheld from your paycheck, you can request that your employer withhold an additional dollar sum. If, on the other hand, you have more income withheld than you should, you will receive a refund after you file your annual income tax return. [le renard de morlange résumé](#) Receiving a refund isn't necessarily a good thing—it represents money you could have been using throughout the year to pay your bills or invest for the future. The higher the number of allowances, the less tax taken out of your pay each pay period. This means that opting for one rather than zero allowances results in less of your paycheck being sent to the Internal Revenue Service (IRS).

Choosing what is suitable depends on your personal circumstances.

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Illinois Department of Revenue  
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Name: \_\_\_\_\_ 2 Write the total number of additional allowances that you are claiming (Step 2, Line 8, of the worksheet), **2**

Street address: \_\_\_\_\_ 3 Write the additional amount you want withheld (deducted) from each pay, **3**

City: \_\_\_\_\_ State: \_\_\_\_\_ Date: \_\_\_\_\_

Check the box if you are exempt from federal and Illinois Income Tax withholding and sign and date the certificate.  Your signature: \_\_\_\_\_

Employer: Keep this certificate with your records. If you have referred the employee's federal certificate to the IRS and the IRS has notified you to disregard it, you may also disregard this certificate. Even if you are not required to refer the employee's federal certificate to the IRS, you may want to disregard this certificate to the Illinois Department of Revenue for the Illinois Income Tax Regulations 89 Ill. Admin. Code 100.7110.

To avoid underpaying or overpaying, it would be wise to seek guidance and use the IRS Withholding Calculator. Lots of people think it's better to opt for more allowances so that less money is withheld from their paychecks to pay taxes. Alternatively, there are others who prefer to play it safe and overpay, mindful that they will get a refund later on down the line. Both of these approaches aren't smart. The best option is to determine when filing Form W-4 how many allowances you qualify for. Doing that will ensure that you don't get hit with a nasty tax bill out of the blue or essentially give the IRS an interest-free loan. The number of allowances that a taxpayer can claim generally depends on their filing status, number of jobs, and whether they have dependents. After an employee decides their number of withholding allowances, it is up to the employer to calculate how much to withhold from each paycheck for federal income taxes. Payroll software should have a built-in calculator to work all this out. Alternatively, employers can consult IRS Publication 15-T: Federal Income Tax Withholding Methods. Ensuring the right amount of money is withheld from each paycheck to pay federal income taxes is important. [74973584756.pdf](#) Employees who make a mistake with the number of withholding allowances claimed can get hit with a nasty tax bill out of the blue or essentially end up lending the IRS money free of charge. Use this tool to estimate the federal income tax you want your employer to withhold from your paycheck. This is tax withholding. See how your withholding affects your refund, take-home pay or tax due. Use this tool to: Estimate your federal income tax withholding See how your refund, take-home pay or tax due are affected by withholding amount Choose an estimated withholding amount that works for you Results are as accurate as the information you enter. Have this ready: Paystubs for all jobs (spouse too) Other income info (side jobs, self-employment, investments, etc.) Most recent tax return Your information isn't saved. Learn more about Security. Use your estimate to change your tax withholding amount on Form W-4.

**W-4 Employee's Withholding Allowance Certificate** (OMB No. 1545-0047) **2018**

1. Your filing status is:  Single  Married filing jointly  Married filing separately  Head of household

2. How many allowances do you claim? **1**

3. Write the additional amount you want withheld from each paycheck. **0**

4. Total number of allowances you're claiming (from the applicable number on the following page) **1**

5. Additional amount, if any, you want withheld from each paycheck **0**

6. Other information (if any, you want withheld from each paycheck) **0**

7. Claim exemption from withholding for 2018, and certify that you meet both of the following conditions for exemption:  
• Last year you had a right to a refund of all federal income tax withheld because that was the liability, and  
• This year you expect a refund of all federal income tax withheld because you expect to have no tax liability.  
If you are claiming an exemption, check the box and enter "Exempt" here.

Under penalty of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, the information is true, correct, and complete.

Employee's name (please print) \_\_\_\_\_ Date: \_\_\_\_\_  
Signature (print name and title) \_\_\_\_\_ Employer's name (print name and title) \_\_\_\_\_  
Social Security number \_\_\_\_\_ Employer's address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
The Primary Act and Paperwork Reduction Act Notice, see page 8. Form W-4 (2018)

Or keep the same amount.  
To change your tax withholding amount: To keep your same tax withholding amount: You don't need to do anything at this time. Check your withholding again when needed and each year with the Estimator. This helps you make sure the amount withheld works for your circumstance. Check your tax withholding every year, especially: When you have a major life change New job or other paid work Major income change Marriage Child birth or adoption Home purchase If you changed your tax withholding mid-year Check your tax withholding at year-end, and adjust as needed with a new W-4 If you have more questions about your withholding, ask your employer or tax advisor. There are several reasons to check your withholding: It can protect against having too little tax withheld and facing an unexpected tax bill or penalty at tax time next year. It can let you adjust your tax withheld up front, so you receive a bigger paycheck and smaller refund at tax time. The Tax Withholding Estimator doesn't ask for personal information such as your name, social security number, address or bank account numbers. We don't save or record the information you enter in the estimator. For details on how to protect yourself from scams, see Tax Scams/Consumer Alerts. Page Last Reviewed or Updated: 13-Apr-2023