

Withholding Certificate for Periodic Pension or Annuity Payments

2022

▶ **Give Form W-4P to the payer of your pension or annuity payments.**

Step 1: Enter Personal Information	(a) First name and middle initial _____	Last name _____	(b) Social security number _____
	Address _____		
	City or town, state, and ZIP code _____		
	(c) <input type="checkbox"/> Single or Married filing separately Number of Allowances _____ NO Federal Income Tax Withheld _____ <input type="checkbox"/> Married filing jointly or Qualifying widow(er) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See pages 2 and 3 for more information on each step and how to elect to have no federal income tax withheld (if permitted).

Step 2: Complete this step if you (1) have 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. **See page 2 for examples on how to complete Step 2.**

Do **only one** of the following.

(a) Reserved for future use.

(b) Complete the items below.

(i) 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-” . . . ▶ \$ _____

(ii) 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-” . . . ▶ \$ _____

(iii) Add the amounts from items (i) and (ii) and enter the **total** here . . . ▶ \$ _____

TIP: To be accurate, submit a 2022 Form W-4P for all other pensions/annuities. Submit a new Form W-4 for your job(s) if you have not updated your withholding since 2019. If you have self-employment income, see page 2.

If (b)(i) is blank and this pension/annuity pays the most annually, complete Steps 3–4(b) on this form. Otherwise, do not complete Steps 3–4(b) on this form.

Step 3: Claim Dependent and Other Credits	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____ Multiply the number of other dependents by \$500 . . . ▶ \$ _____ Add other credits, such as foreign tax credit and education tax credits ▶ \$ _____ Add the amounts for qualifying children, other dependents, and other credits and enter the total here . . .	3	\$ _____
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Step 4 (optional): Other Adjustments	(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 . . .	4(a)	\$ _____
	(b) Deductions. If you expect to claim deductions other than the basic standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . (IF YOU WANT ONLY A SPECIFIC AMOUNT DEDUCTED)	4(b)	\$ _____
	(c) Extra withholding. Enter any additional tax you want withheld from each payment (If you want additional deductions on top of your standard deduction above)	4(c)	\$ _____

Step 5:
Sign Here

▶ _____ Your signature (This form is not valid unless you sign it.)	▶ _____ Date
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Form NJ-W-4P

NJ-W-4P CERTIFICATE OF VOLUNTARY WITHHOLDING OF NEW JERSEY GROSS INCOME TAX (04-17) FROM PENSION AND ANNUITY PAYMENTS

Print Your Full Name			Your Social Security Number _____ - _____ - _____		
Home Address			ID Number of Your Pension or Annuity (From Your Statement or Contact Your Payer): _____		
City or Town	State	Zip Code			
<input type="checkbox"/> I want to have New Jersey Gross Income Tax withheld from this pension or annuity payment in the amount of \$ _____ .00 <i>(Enter a whole dollar amount of \$10 or more for each payment.)</i>					
<input type="checkbox"/> I want to stop withholding New Jersey Income Tax from this pension or annuity payment.					
Your Signature _____			Date _____		
MAIL THIS FORM TO YOUR PENSION OR ANNUITY PAYER					
FORM MAY BE REPRODUCED					

You can use Form NJ-W-4P to notify your pension payer to begin, change, or stop withholding New Jersey Income Tax from your pension or annuity payments.

Note: If you previously completed this form, do not file again unless you want to make a change.

Instructions

- Fill in your name, address, and Social Security Number;
- Enter the identification number of your pension or annuity contract. If you do not find this number on your annual pension or annuity statement, ask your pension plan administrator;
- Check only one box. If you are requesting to have Income Tax withheld, you also must enter the amount you want deducted from each payment;
- Sign and date the completed form;
- **Mail this form to the payer of your pension or annuity. If you do not have the mailing address, you must contact your payer.**

For State of New Jersey retirees and benefit recipients only, visit the [New Jersey Division of Pensions and Benefits](#) for mailing information.

Why should I file this form?

Your pension or annuity may be taxable and you may owe tax when you file your New Jersey Income Tax return. Use this form to have the payer of your pension or annuity withhold New Jersey Income Tax for you. If you choose not to withhold New Jersey Income Tax, you may be required to make estimated tax payments.

Note: If you do not expect to owe Income Tax to New Jersey at the end of the tax year, do not request to have New Jersey Income Tax withheld.