

Form W-4 Instructions

Purpose of form: Form W-4 is used to withhold the correct amount of Federal income tax from your pay.

Employee's Withholding Certificate

Step 1.

- a. Write your first name and middle initial, last name, street address, city or town, state, and ZIP code.
- b. Write your social security number.
 - i. If your name does not match the name on your social security card, contact the SSA at 800-772-1213 or go to www.ssa.gov.
- c. Check your filing status (single or married filing separately, married filing jointly, or head of household).

Complete Steps 2 through 4 of the Form W-4 ONLY if they apply to you.

- Step 2. Estimate your withholding using options (a) or (b), or check the box for option (c).
- Step 3. Enter amounts for each line, add them together, and write the total in box 3.
- Step 4. Enter amounts for (a) Other income, (b) Deductions, and (c) Extra withholding.

To claim exemption from withholding: If you meet both conditions noted on the Form W-4, write "Exempt" in the space below Step 4(c) and complete Steps 1 and 5. Do not complete any other steps on the Form W-4.

- Step 5. Sign and write today's date.



Choice. With Confidence.

Sample Form W-4

Form W-4		Employee's Withholding Certificate		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service		▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.		2021
Step 1: Enter Personal Information	(a) First name and middle initial Jane A.	Last name Doe	(b) Social security number XXX-XX-XXXX	
	Address 1234 Main Street		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .	
	City or town, state, and ZIP code Raleigh, NC XXXXX			
	(c) <input checked="" type="checkbox"/> Single or <input type="checkbox"/> Married filing separately <input type="checkbox"/> Married filing jointly or <input type="checkbox"/> 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 page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App , and privacy.				
Step 2: Multiple Jobs or Spouse Works				
Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld ▶ <input type="checkbox"/> TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.				
Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependents				
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 ▶ \$ XXXX Multiply the number of other dependents by \$500 ▶ \$ XXXX Add the amounts above and enter the total here 3 \$ XXXX				
Step 4 (optional): Other Adjustments				
(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income 4(a) \$ XXXX				
(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here 4(b) \$ XXXX				
(c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) \$ XX				
Step 5: Sign Here				
Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. Jane Doe MM/DD/YYYY ▶ Employee's signature (This form is not valid unless you sign it.) ▶ Date				
Employers Only				
Employer's name and address		First date of employment	Employer identification number (EIN)	
For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form W-4 (2021)				

1a. Write your name, street address, city or town, state, and ZIP code.

1b. Write your social security number.

1c. Check your filing status.

Complete Steps 2 through 4 of the Form W-4 ONLY if they apply to you.

2. Estimate your withholding using options (a) or (b), or check the box for option (c).

3. Enter amounts for each line, add them together, and write the total in box 3.

4. Enter amounts for (a) Other income, (b) Deductions, and (c) Extra withholding.

5. Sign and date.

Special Instructions for Claiming "Exempt"

If the Attendant meets both conditions noted on the Form W-4, they can write "Exempt" in the space below Step 4(c) and complete Steps 1 and 5 to claim exempt. No other steps on the Form W-4 should be completed. The Form W-4 will need to be completed annually (by February) if the employee wishes to remain at "Exempt" status from year to year.