

Tax Election Change Form

Name (Required) <input style="width: 90%;" type="text"/>	Full SSN (Required) <input style="width: 90%;" type="text"/>
BNY Mellon Acct Number(s) or Company Retired From <input style="width: 95%;" type="text"/>	
Email <input style="width: 80%;" type="text"/>	Phone Number <input style="width: 80%;" type="text"/>

Federal law requires you to make a withholding election regarding your pension benefit. You can elect to have no withholding. Your election (or automatic withholding) will remain in effect until you change it. If you elect not to have income tax withheld, you are responsible for payment of any income tax due. You may also be subject to tax penalties if your payments of estimated tax and/or withholding, if any, are not adequate.

FEDERAL TAX ELECTION

Complete only 1 Federal Election column: W4P- or W4 (See website irs.gov for form specific instructions)

W-4P Elections (Pension and Annuity Payments)	W-4 Elections
<input type="checkbox"/> NO Withholding <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Head of household	<input type="checkbox"/> NO Withholding <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Head of household
<input type="checkbox"/> Income from a Job and/or Multiple Pensions/Annuities (Including a Spouse's Job/Pension/Annuity) – Total amount \$ _____ (W-4P Step 2)	<input type="checkbox"/> Check here to withhold at higher rate - You must also select Single, Married or Head of Household option above (Multiple Jobs or Spouse Works - Step 2)
<input type="checkbox"/> Claim Dependent and Other Credits - Total amount \$ _____ (W-4P Step 3)	<input type="checkbox"/> Claim Dependent and Other Credits - Total amount \$ _____ (W-4 Step 3)
<input type="checkbox"/> Other Income (not from jobs or pension/annuity payments). \$ _____ (W-4P Step 4a)	<input type="checkbox"/> Other Income (not from jobs). \$ _____ (W-4 Step 4a)
<input type="checkbox"/> Other Deductions \$ _____ (W-4P Step 4b)	<input type="checkbox"/> Other Deductions \$ _____ (W-4 Step 4b)
<input type="checkbox"/> Extra Withholding \$ _____ (W-4P Step 4c)	<input type="checkbox"/> Extra Withholding \$ _____ (W-4 Step 4c)

STATE TAX ELECTION

- NO Withholding
- Withhold **married** with _____ allowances
- Withhold **single** with _____ allowances
- Withhold at above rate plus an additional amount \$ _____ or additional percentage _____%
- Withhold **ONLY** a flat amount \$ _____ or flat percentage _____%

I understand that the changes to my address and/or tax elections may take two payment cycles to become effective upon receipt of this form.

Signature	(Signature REQUIRED for processing)	Date
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Benefit Disbursements - BNYM, PO Box 360534, Pittsburgh, PA 15251-6534
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