TAX FORM RESOURCE

Sonoma County Employees' Retirement Association (SCERA) cannot provide tax advice. Please consult a tax professional for questions regarding what to elect on the tax forms below.

SCERA's Tax Form Resource is to provide guidance on the tax forms below which should be completed based on the different ways you elect to have income taxes withheld from your SCERA pension.

SCERA is only able to withhold income taxes for: Federal Internal Revenue Service (IRS) on form W-4P and the State of California on form DE-4P.

You should always submit a manually signed tax form to SCERA so that we know what, if anything, to withhold from your taxable benefit. If you have taxable benefit and no form is submitted or the form is incorrect, we will withhold at the required default rate per the IRS and California.

IRS W-4P: Single **California DE-4P:** Single, 0 allowances

Federal Tax Form W-4P Instructions:

For more information on the Federal W-4P please visit:
https://www.irs.gov/pub/irs-pdf/p15t.pdf.

You MUST manually sign and date your W-4P in Step 5 for it to be valid.

A. For No Withholding:

1. Only complete steps 1a and 1b. Do not complete Step 1c. **If you complete step 1c, the form must be corrected.**
2. In the "No Withholding" section below Step 4, check the box for No Withholding (in the space below Step 4(c)).

B. To have taxes withheld using a filing status:

1. You must complete all of step 1.

C. To have taxes withheld using a filing status plus steps 2-4:

1. You must complete all of step 1.
2. Step 2 – Part b, optional
   i. If completed, all of the lines must be populated in (i) or (ii). Line (iii) must have the TOTAL populated. **If your amounts do not add up, your form must be corrected**
3. Step 3, optional
   i. If completed, all of the lines must be populated and the TOTAL line must be completed. **If your amounts do not add up, your form must be corrected.**
4. Step 4, optional
   i. If completed, complete only those lines that apply.

California State Tax Form DE-4P Instructions:

For more information on the California DE-4P please visit:
https://edd.ca.gov/siteassets/files/pdf_pub_ctr/26methb.pdf.

You MUST manually sign and date your DE-4P below Line 4 for it to be valid.

A. For No Withholding:

1. You must complete personal information.
2. You must mark the box on line 1.
3. You **CANNOT** complete items 2-4. **If you populate lines 2-4, your form must be corrected.**

B. To have taxes withheld using only filing status:

1. You must complete personal information.
2. Mark only one filing status on line 2a (i.e. Single; Married; Head of Household).
3. You must complete all lines 2b-2d.
4. You **CANNOT** complete line 3 and 4.

C. To have taxes withheld using a filing status plus an additional amount:

1. You must complete personal information.
2. Mark only one filing status on line 2a (i.e. Single; Married; Head of Household).
3. You must complete all lines 2b-2d.
4. Include an additional withholding amount on Line 3 (this is an additional amount above the calculated tax).
5. You **CANNOT** complete line 4.

D. To have taxes withheld using only a flat amount:

1. You must complete personal information.
2. You **CANNOT** complete step 2 or 3.
3. Include a flat withholding amount on Line 4.