



Teachers' Retirement System of the State of Kentucky

479 Versailles Road
 Frankfort, KY 40601-3800
 800-618-1687

Tax Withholding Certificate

Annuity payments are subject to federal taxes and state taxes if filing in Kentucky. Withholding is optional, but failure to properly withhold for federal taxes could result in an IRS penalty for underpayment. Annuity payments to Kentucky residents are partially or completely exempt from Kentucky state tax depending on when the work that earned the annuity occurred. TRS does not withhold tax for other states or local taxing jurisdictions. Complete the federal section, Kentucky state section or both, as desired. For details, see the tax information page on the TRS website at <https://trs.ky.gov/retired-members/1099r-information/>.

If you are receiving more than one annuity, check any annuity this certificate applies to: first, second, survivor.

Full name (Print)	Social Security number	Primary phone number
Address (Street/City/State/ZIP)		

Federal Tax Withholding: Complete the applicable lines.

1. Check here if you do not want any federal income tax withheld from your annuity payment. (Do not complete lines 2, 3 or 4.)	<input type="checkbox"/>
2. Enter total number of allowances and marital status you are claiming for withholding from each annuity payment. (You also may designate an additional dollar amount or percentage on line 3.) Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher single rate	Number of allowances
3. Complete only if you would like an additional amount or percentage withheld from your annuity payment above what is designated on line 2.	Additional amount: \$ _____ or Additional percentage: ____ %
4. Complete only if you would like a fixed amount or percentage withheld from your annuity payment.	Fixed amount: \$ _____ or Fixed percentage: ____ %

Kentucky Resident State Tax Withholding: Complete only one line.

<input type="checkbox"/>	Check at left for no Kentucky state withholding.	
<input type="checkbox"/>	Check at left only to withhold the flat 5% Kentucky tax rate.	
<input type="checkbox"/>	Check at left to withhold the 5% Kentucky state tax rate and an additional amount or percentage from your annuity payment. Then use one blank at right to indicate the additional amount or percentage.	Additional amount: \$ _____ or Additional percentage: ____ %
<input type="checkbox"/>	Check at left to withhold only a fixed amount or percentage from your annuity payment instead of the 5% Kentucky state tax rate. Then use one blank at right to indicate the fixed amount or percentage.	Fixed amount: \$ _____ or Fixed percentage: ____ %

Signature	Date
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**Make a copy for your records
and return this form to:**

**Teachers' Retirement System
479 Versailles Road
Frankfort, KY 40601-3800**