

## Oklahoma Tax Commission Withholding Certificate for Periodic Pension or Annuity Payments

This certificate is for income tax withholding purposes only. Type or print.

**NOTE: Do NOT mail to the Oklahoma Tax Commission.**

|  |   |                              |
|--|---|------------------------------|
| Your First Name and Middle Initial:              | Last Name:  | Your Social Security Number: |
| Home Address (Number and Street or Rural Route): | Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Married<br><input type="checkbox"/> Married, but withhold at higher Single rate |                              |
| City or Town:                                    | State:  | ZIP Code:                    |

**General Information**  
Complete Form OK-W-4-P to have payers withhold the correct amount of state income tax from your periodic pension, annuity, profit-sharing and stock bonus plan, or IRA payments. State income tax withholding applies to the taxable part of these payments. Periodic payments are made in installments at regular intervals over a period of more than one year. Form OK-W-4-P should not be used for a nonperiodic payment or an eligible rollover distribution. Instead, use Withholding Certificate for Nonperiodic Payments and Eligible Rollover Distributions Form OK-W-4-R for such payments or distributions. **Note:** You can choose not to have tax withheld regardless of how much tax is owed for the previous year, or is expected to be owed in the current year.

|   |   |    |
|---|---|----|
| 1. Allowance for Yourself: Enter 1 for yourself.....  | 1 |    |
| 2. Allowance for Your Spouse: Does your spouse work? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, enter "0". If No, enter "1" for your spouse   | 2 |    |
| 3. Allowance For Dependents: Enter the number of dependents you will claim on your tax return. Do not claim yourself or your spouse or dependents that your spouse has already claimed on his or her Form OK-W-4-P .....  | 3 |    |
| 4. Additional Allowances: You may claim additional allowances if you itemize your deductions or have other state tax deductions or credits that lower your tax. Enter the number of additional allowances you would like to claim .....   | 4 |    |
| 5. Total Number of Allowances You Are Claiming: Add lines 1 through 4 and enter total here.....<br>(If the recipient has not provided a withholding certificate, tax will be withheld as if the recipient were married and claiming three withholding allowances, pursuant to OAC 710:90-1-13.)   | 5 |    |
| 6. Additional Withholding: If you expect to have a balance due (as a result of interest income, dividends, income from a part-time job, etc.) on your tax return, you may request your employer to withhold an additional amount of tax from each pay period. To calculate the amount needed, divide the amount of the expected balance due by the number of pay periods in a year. Enter the additional amount to be withheld each pay period here ..... | 6 | \$ |
| 7. If you choose to <b>not</b> have state income tax withheld from you payments, write "No Withholding" on line 7.....  | 7 |    |

Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or I am entitled to claim exempt status.

|   |                    |
|---|--------------------|
| Employee's Signature (Form is not valid without signature): | Date (MM/DD/YYYY): |
|---|--------------------|

### Items to Remember:

- If your filing status is married filing joint and your spouse works, do not claim an exemption on Form OK-W-4-P for your spouse.
- If you and your spouse have dependents, please be sure only one of you claim the dependents on your Form OK-W-4-P. If both spouses claim the dependents as an allowance on Form OK-W-4-P, it may cause you to owe additional Oklahoma income tax when you file your return.
- If you itemize your deductions, instead of using the standard deduction, the amount not taxed by Oklahoma may be a greater or lesser amount.
- Certain retirement benefits may be excluded from Oklahoma adjusted gross income (see Oklahoma Resident Income Tax Return Form 511 Schedule 511-A instructions for details). To be eligible, you must have retirement income in your name.