

SUBSTITUTE FORM W-4P
FEDERAL WITHHOLDING CERTIFICATE
PERIODIC PENSION DISTRIBUTIONS

Complete this Substitute Form W-4P to elect federal income tax withholding from periodic pension distributions. Please check one of the boxes below for the pension plan to which your federal income tax election applies:

The Church Pension Fund Clergy Pension Plan
 The Episcopal Church Lay Employees' Retirement Plan
 International Clergy Pension Plan

- PLEASE TYPE OR PRINT CLEARLY -

I. YOUR INFORMATION

First name and middle initial		Last name		Social Security Number	
Home address (number and street or rural route)				Client identification number (if known) of your pension contract	
City or town	State	ZIP Code	Country		

IF YOU ARE A RETIRED CLERIC – COMPLETE SECTION A.

IF YOU ARE A RETIRED LAY, SURVIVING SPOUSE, BENEFICIARY OR AN ALTERNATE PAYEE – COMPLETE SECTION B.

II. FEDERAL INCOME TAX WITHHOLDING ELECTION

SECTION A: Retired Cleric (voluntary federal income tax withholding election) – Complete ONLY one of the following:

Check here if you do **NOT** want any federal income tax withheld from each monthly pension distribution
 Check here if you would like a specific amount of federal income tax withheld from each monthly pension distribution and complete the following:

Flat Amount \$ _____

Check here to have federal income tax withheld from each monthly pension distribution based on IRS tax tables and marital status and number of allowances claimed below:

Step 1: Check marital status: Single Married Married, but withhold at higher single rate

Step 2: Enter the number of allowances you are claiming for withholding from each monthly pension distribution: _____

Optional: Additional dollar amount, if any, you want withheld from each monthly pension distribution: \$ _____

(You cannot enter an additional amount without completing marital status and total number of allowances above)

SECTION B: Retired Lay, Surviving Spouse, Beneficiary or Alternate Payee – Complete ONLY one of the following:

If you do not choose one of the federal income tax withholding options below, The Church Pension Fund is required by law to withhold federal income taxes as if you elected married with three allowances. If you do not live in the U.S. or one of its possessions, you cannot claim the option “do NOT want any federal income tax withheld.”

Check here if you do **NOT** want any federal income tax withheld from each monthly pension distribution *(Available for U.S. residents only)*

Check here to have federal income tax withheld from each monthly pension distribution based on IRS tax tables and marital status and number of allowances claimed below:

Step 1: Check marital status: Single Married Married, but withhold at higher single rate

Step 2: Enter the number of allowances you are claiming for withholding from each monthly pension distribution: _____

Optional: Additional dollar amount, if any, you want withheld from each monthly pension distribution: \$ _____

(You cannot enter an additional amount without completing marital status and total number of allowances above)

III. ACKNOWLEDGEMENT

Your election will remain in effect until you submit a new Substitute Form W-4P. If the social security number you provide on this Substitute Form W-4P is incorrect or is blank, The Church Pension Fund will disregard your federal income tax withholding elections. If you elect not to have federal income tax withholding applied to your periodic pension distributions, or if you do not have enough federal income tax withheld from your periodic pension distributions, you may be responsible for payment of estimated tax. We recommend that you consult with your tax advisor.

By signing below, I authorize The Church Pension Fund to apply federal income tax withholding elections indicated on this form to the periodic pension distributions made from either The Church Pension Fund Clergy Pension Plan, The Episcopal Church Lay Employees' Retirement Plan or the International Clergy Pension Plan.

Signature _____ **Date** _____