

**SUBSTITUTE FORM W-4P**  
**FEDERAL WITHHOLDING CERTIFICATE**  
**PERIODIC ANNUITY DISTRIBUTIONS**

Complete this Substitute Form W-4P to elect federal income tax withholding from periodic annuity distributions.

- 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 annuity contract	
City or town	State	ZIP Code	Country		

**IF YOU ARE A CLERIC RECEIVING DISTRIBUTIONS FROM YOUR 403(b) TAX-DEFERRED ANNUITY— COMPLETE SECTION A.**  
**ALL OTHERS RECEIVING DISTRIBUTIONS FROM AN ANNUITY – COMPLETE SECTION B.**

**II. FEDERAL INCOME TAX WITHHOLDING ELECTION**

**SECTION A: 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 403(b) tax-deferred annuity distribution  
 Check here if you would like a specific amount of federal income tax withheld from each monthly 403(b) tax-deferred annuity distribution and complete the following:

**Flat Amount \$** \_\_\_\_\_

Check here to have federal income tax withheld from each monthly 403(b) tax-deferred annuity 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 for withholding from each monthly 403(b) tax-deferred annuity distribution: \_\_\_\_\_

**Optional:** Additional dollar amount, you want withheld from each monthly 403(b) tax-deferred annuity distribution: \$ \_\_\_\_\_

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

**SECTION B: All Others – Complete ONLY one of the following:**

If you do not choose one of the federal income tax withholding options below, Church Life Insurance Corporation 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 annuity distribution *(Available for U.S. residents only)*

Check here to have federal income tax withheld from each monthly 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 annuity distribution: \_\_\_\_\_

**Optional:** Additional dollar amount, if any, you want withheld from each monthly annuity 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, Church Life Insurance Corporation will disregard your federal income tax withholding elections. If you elect not to have federal income tax withholding applied to your periodic annuity distributions, or if you do not have enough federal income tax withheld from your periodic annuity distributions, you may be responsible for payment of estimated tax. We recommend that you consult with your tax advisor.

By signing below, I authorize Church Life Insurance Corporation to apply federal income tax withholding elections indicated on this form to the periodic distributions made from my annuity contract with Church Life Insurance Corporation.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Tax Hotline Service:**

Nancy Fritschner, CPA (877) 305-1414  
 The Rev. Canon William Geisler, CPA (877) 305-1415  
 Dolly Rios, CPA (833) 363-5751  
**Any questions, call:** Client Services (866) 802-6333  
 Monday-Friday 8:30AM – 8:00PM ET

**Submit the completed and signed form:**

Church Life Insurance Corporation  
 19 East 34<sup>th</sup> Street, New York, NY 10016  
 Attn: Client Services  
**E-mail:** admin-assist@cpg.org  
**Fax:** (877) 432-9274

**For more information on IRS withholding tables and instructions to IRS Form W-4P and the related worksheets,** please visit [www.irs.gov/pub/irs-pdf/fw4p.pdf](http://www.irs.gov/pub/irs-pdf/fw4p.pdf).