

# Form W-4 (2017)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

**Exemption from withholding.** If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2017 expires February 15, 2018. See Pub. 505, Tax Withholding and Estimated Tax.

**Note:** If another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding if your total income exceeds \$1,050 and includes more than \$500 of unearned income (for example, interest and dividends).

**Exceptions.** An employee may be able to claim exemption from withholding even if the employee is a dependent, if the employee:

- is age 65 or older,
- is blind, or
- will claim adjustments to income; tax credits; or itemized deductions, on his or her tax return.

The exceptions don't apply to supplemental wages greater than \$1,000,000.

**State instructions.** If you aren't exempt, complete the Personal Allowances Worksheet below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earner/multiple jobs situations.

**Complete all worksheets that apply.** However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

**Head of household.** Generally, you can claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individual(s). See Pub. 001, Exemptions, Standard Deduction, and Filing Information, for information.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the Personal Allowances Worksheet below. See Pub. 505 for information on covering your other credits into withholding allowances.

**Nonwage income.** If you have nonwage income, such as the employer making estimated tax 1043-ES, Estimated Tax for Individuals, you may owe additional tax. If you have annuity income, see Pub. 505 to adjust your withholding on Form W-4.

**Two-earners or multiple jobs.** If you work for more than one employer, you must complete a Form W-4 for each job. Your withholding usually is based on the highest paying job and the allowances claimed on the others. See Pub. 505 for details.

**Check your withholding.** Adjustments to your withholding may be necessary. See Pub. 505 for details. **Future developments.** Information about future changes affecting Form W-4 is available at [www.irs.gov/w4](http://www.irs.gov/w4).

the amount of a dividend made using Form 987. Otherwise, see part 8 or 9 of Form W-4.

If you have a job, sign the form to validate it. Only one Form W-4 can be most accurate. Allowances are 15 for details.

resident alien, see 4-4 instructions for 17 Form W-4.

or Form W-4 before a amount you are projected total tax if your earnings 300 (part 8).

about any future 17) will be posted

## Personal Allowances Worksheet (Keep for your records.)

**A** Enter "1" for yourself if no one else can claim you as a dependent. . . . .

**B** Enter "1" if:   
 • You're single and have only one job; or   
 • You're married, have only one job, and your spouse doesn't work; or   
 • Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.

**C** Enter "1" for your spouse. But, you may choose to enter "0" if you are married and have either a working spouse or than one job. (Entering "0" may help you avoid having too little tax withheld.) . . . . .

**D** Enter number of dependents (other than your spouse or yourself) you will claim on your tax return. . . . .

**E** Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above).

**F** Enter "1" if you have at least \$2,000 of child or dependent care expenses for which you plan to claim a credit. (Note: Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.) . . . . .

**G** Child Tax Credit (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information.   
 • If your total income will be less than \$70,000 (\$100,000 if married), enter "2" for each eligible child; then less "1" if you have two to four eligible children or less "2" if you have five or more eligible children.   
 • If your total income will be between \$70,000 and \$84,000 (\$100,000 and \$119,000 if married), enter "1" for each eligible child.

**H** Add lines A through G and enter total here. (Note: This may be different from the number of exemptions you claim on your tax return.)

For accuracy, complete all worksheets that apply.   
 • If you plan to itemize or claim adjustments to income and want to reduce your withholding, see the Itemized Deductions and Adjustments Worksheet on page 2.   
 • If you are a single and have more than one job or are married and you and your spouse both work, see the Two-Earners/Multiple Jobs Worksheet to avoid having too little tax withheld.   
 • If neither of the above situations applies, stop here and enter the number from line H on line 6 of Form W-4.

**A** 1

**B** \_\_\_\_\_

**C** \_\_\_\_\_

**D** \_\_\_\_\_

**E** \_\_\_\_\_

**F** \_\_\_\_\_

**G** 2

**H** 3

ne combined on page 2 below.

Separate here and give Form W-4 to your employer. Keep the top part for your records.

**Form W-4** **Employee's Withholding Allowance Certificate**

Department of the Treasury Internal Revenue Service

1 Your first name and middle initial: Norma G. Last name: Rodriguez

2 Your social security number: 652-14-0916

3 Home address (number and street or rural route): 1331 Walden Ct. City or town, state, and ZIP code: Longmont, CO 80504

4 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2): 3

5 Additional amount, if any, you want withheld from each paycheck: \_\_\_\_\_

6 I claim exemption from withholding for 2017, and I certify that I meet both of the following conditions for exemption:   
 • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and   
 • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.   
 If you meet both conditions, write "Exempt" here. \_\_\_\_\_

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature: Norma Rodriguez Date: 4/17/17

9 Employer's name and address (Employer: Complete lines 9 and 10 only if sending to the IRS.) 10 Office code (optional) 11 Employer's tax identification number (EIN)

No. 1045-0074

**2017**

number 14-0916

Single rate

Single box

marry card, work card.

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and complete.

11/17

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For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 102202

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| 1 |
| 1 |
| 1 |
| 3 |