



# Deferred Compensation Plan Tax Withholding Change Request Form



- Please Print - Black Ink Preferred -

## I. PERSONAL INFORMATION: Check here if you are a U.S. Citizen or Resident Alien. Proof required if you live outside the U.S.

PARTICIPANT ID OR LAST 4 DIGITS OF SSN	DATE OF BIRTH (MM/DD/YY)	AREA CODE	DAYTIME PHONE NUMBER	AREA CODE	MOBILE PHONE NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
LAST NAME			FIRST NAME		
<input type="text"/>			<input type="text"/>		
HOME MAILING ADDRESS - NUMBER AND STREET - <input type="checkbox"/> CHECK HERE IF THIS IS A NEW ADDRESS					APT
<input type="text"/>					<input type="text"/>
CITY					STATE
<input type="text"/>					<input type="text"/>
FORMER AGENCY NAME					ZIP CODE
<input type="text"/>					<input type="text"/>

## II. TAX WITHHOLDING CHANGE REQUEST FOR: (Choose only one from choices 1 - 4 below. Please complete a separate form for each Plan.)

- 457 Plan:  Pre-Tax *or*  Roth *or*  Both Specify account type:  01  02
- 401(k) Plan:  Pre-Tax *or*  Roth *or*  Both Specify account type:  03  04
- 401(k) Plan Special Rollover Account (account type: 05)
- 401(a) Plan (account type: 06)

## III. TAX WITHHOLDING:

Please Choose one or Both

### Federal Tax Withholding

#### 1) Pre-Tax 457 and Pre-Tax 401(k) Federal Tax Withholding

For periodic payments of less than ten years, Full Withdrawals and Amount Certain distributions, the Plan is required to withhold 20% for Federal Income taxes. If you want the Plan to withhold a greater percentage, please indicate percentage amount below.

Other – please indicate higher percentage amount \_\_\_\_\_% (must be a whole percentage above 20%)

For periodic payments of ten years or longer or a Required Minimum Distribution, the IRS does not require a specific withholding rate. 10% will be withheld unless you indicate a certain percentage amount below.

Please do not withhold taxes

Other – please indicate percentage amount \_\_\_\_\_%

#### 2) Non-Qualified Roth 457 and Roth 401(k) Federal Tax Withholding (See Distribution Guide for explanation regarding non-qualified distributions.)

You are not subject to federal income taxes on Qualified Distributions from your Roth account. Earnings on Non-Qualified Distributions, however, are subject to a 20% federal income tax withholding. If you want the Plan to withhold a greater percentage, please indicate amount below.

Other – please indicate percentage amount \_\_\_\_\_%

### State Withholding

The Plan is not required to withhold income taxes for all states. If you want a portion of your distribution withheld for state income taxes, please complete the following:

I request a withholding rate of \_\_\_\_\_% for the State of \_\_\_\_\_.

## IV. AUTHORIZATION

I understand that the execution of this form and delivery thereof to the New York City Deferred Compensation Plan revokes any prior income tax withholding instructions I have made.

SIGNATURE

DATE

**Return to:**  
 Deferred Compensation Plan  
 Bowling Green Station,  
 P.O.Box 93  
 New York, NY 10274-0093  
**Attn:** Distributions

**Overnight Address:**  
 Deferred Compensation Plan  
 22 Cortlandt Street, 28th Fl  
 New York, NY 10274-0093  
**Attn:** Distributions

### OFFICE USE ONLY

PROCESSOR INITIALS

DATE PROCESSED

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>
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