Department of Administrative Services

Division of Employee Benefits
Employees' Retirement System

TO: ALL MILWAUKEE COUNTY RETIREES

RE: WISCONSIN TAX WITHHOLDING

Each retiree should make his or her own determination regarding Wisconsin state income tax withholding by completing the certificate below. Wisconsin law does not require that state income tax be withheld from monthly annuity benefit payments, but you may specify an amount to be withheld each month or choose the applicable number of allowances and ERS will calculate the withholding amount for you based on the Wisconsin Tax Tables. If on the Federal Withholding Certificate you elected **NO** taxes to be withheld or you elected to have a specific dollar amount withheld, you will have **NO** taxes withheld for the State of Wisconsin, unless you elect to have amounts withheld on the certificate below.

If you became a member of the County Retirement System **on or before December 31, 1963**, your pension for Wisconsin State Tax purposes is reportable but NOT TAXABLE at the present time. If you are a Wisconsin resident and become a member of the Retirement System **on or after January 1, 1964**, your pension is **TAXABLE INCOME** for Wisconsin State Tax purposes. Regardless of your start date, if you are currently receiving an accidental disability pension, your pension is exempt from Wisconsin Income Tax.

Please complete the certificate below:

A. You may adjust the amount of tax withheld by completing Box A, indicating whether you are married or single and indicating the appropriate number of allowances, or
B. You may elect to have NO tax withheld by completing Box B, or
C. You may choose an additional withholding amount by completing Box C.
D. You may elect a specific monthly withholding amount (not less than $5.00) by completing Box D.

If you elect **NOT** to have any taxes withheld or if you do **NOT** have enough Wisconsin Income Taxes withheld from your pension, you may be responsible for the payment of estimated tax. You may incur penalties under the State of Wisconsin Estimated Tax rules if your withholding and estimated tax payments are not sufficient. Please note that any questions concerning this matter should be addressed to your personal tax advisor or the local office of the Internal Revenue Service or the Wisconsin Department of Revenue. ERS can only withhold state taxes for the State of Wisconsin.

MILWAUKEE COUNTY RETIREES' WITHHOLDING ALLOWANCE CERTIFICATE
STATE INCOME TAXES

SUB
WT-4
2009

Print Name_____ Social Security Number_____

Address_____ City_____ State_____ Zip_____

Please complete **ONLY ONE** of the following:

A. ☐ I elect State Income Taxes **TO BE WITHHELD** from my pension payment. If you choose to have income tax withheld, please complete Box A and C, or Box D.

I am (Married – Single) and wish to claim_____ allowances.
(Circle Only One) **(Number)**

B. ☐ I elect **NOT TO HAVE** any Wisconsin State Income Tax withheld from my monthly pension payment.

C. ☐ In addition to the amounts withheld by checking and completing Box A, I elect to have the following **ADDITIONAL AMOUNT** withheld monthly for State Income Taxes. $_____.

D. ☐ I elect to have the following **Total Amount** withheld monthly for State Income Taxes. $_____ (minimum of $5.00).

Signature_____ Date_____

Courthouse Room 210-C • 901 North 9th Street • Milwaukee, WI 53233 • 414-278-4207