

W-4 Form—Employee's Withholding Allowance Certificate

See Reverse Side Instructions

Student Hourly (Paid Biweekly)
 Faculty, Academic Staff, TA, RA (Paid Monthly)
 Classified/LTE (Paid Biweekly)

Please Print. This is a tax form. Do not use this form for an Address Change only (please see the Home Address Change form available at: payroll.uwm.edu) On every W-4 form you submit you must indicate your marital status and exemption status or it will be assigned as Single with zero exemptions.

U.S. Social Security Number / /	Name Last 	First 	Middle Initial
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If your name differs from that on your Social Security card, check here and call 1-800-772-1213 for a new card.

Birthdate (Month-Day-Year) / /	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Marital Status—For Tax Withholding (check only one) <input type="checkbox"/> Single (or married but legally separated) <input type="checkbox"/> Married <input type="checkbox"/> Married but withhold at higher Single rate <small>Note: All <u>Non-Resident Aliens</u> are required to check Single. (See additional instructions on reverse side.)</small>
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Heritage Code See definitions on reverse side. <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	Wisconsin County Employed
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Exempt (Exempt status expires February 15) **International Nonresident Alien employees cannot claim exempt.**
 I claim exemption from withholding this year and I certify that I meet **BOTH** of the following:

- Last year I had a right to a refund of **ALL** income tax withheld because I had **NO** tax liability; **AND**
- This year I expect a refund of **ALL** income tax withheld because I expect to have **NO** tax liability.

And that I do not meet the conditions listed on the reverse side.

Exempt for Federal Tax: Yes No **Exempt for Wisconsin State Tax** Yes No

If you have checked yes in one of these boxes, do NOT enter any amounts in the Federal and/or Wisconsin State Tax blocks.

Non-Resident of Wisconsin
 I declare that while working in Wisconsin, I am a legal resident of the state indicated below, and that I am not subject to Wisconsin income tax withholding in accordance with a reciprocal tax agreement. Check appropriate box:

Indiana Illinois Michigan Kentucky **Minnesota residents must complete and attach a W-222 annually;**
W-222 can be found at: www.revenue.wi.gov/forms/with/w-222.pdf

If you have checked one of these boxes, do NOT enter any amounts in the Wisconsin State Tax blocks.

FEDERAL TAX		WISCONSIN STATE TAX	
Number of Allowances for Federal Tax (leave blank if claiming exempt).	Additional Federal Tax to be Withheld: \$	Number of Allowances for Wisconsin State Tax (leave blank if claiming exempt).	Additional Wisconsin State Tax to be Withheld: \$

My U.W. Work is performed outside of Wisconsin and I reside outside of Wisconsin and I am not a Wisconsin resident.
 USA State or foreign country of Residence: _____
 USA State or foreign country where work is performed: _____
 US Citizens working outside of the U.S. may qualify for exemption from state and federal income tax by filing IRS Form 673.

U.S. Home Telephone - (area code/number)
 () - _____

Which address would you like mailings to be sent? **Permanent** **Local**

Permanent Address Street, Apt #	City	State	Zip
Local Address Street, Apt #	City	State	Zip

Under the 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. (This form is not valid unless you sign it.)

Date (Mo/Day/Yr)	Employee Signature	Address Release My home mailing address and telephone number may be made available for the staff directory and released to the public upon request. <input type="checkbox"/> Yes <input type="checkbox"/> No
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All International Visitors Complete the Following – See reverse side for additional information

For tax purposes, check one box and (see instructions) <input type="checkbox"/> Nonresident Alien <input type="checkbox"/> Resident Alien	Visa Type (If permanent resident with a Green Card, write "Green Card", the date issued, and submit a copy of the Green Card.)	Country of Residence	Date of Arrival in U.S. (Mo/Day/Yr) - -
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Gender and Heritage Code

Supplying this information is voluntary. The information will be treated as confidential and will not be disclosed in response to a public records request. It will be used for affirmative action reporting and related University purposes.

(Indicate lowest Heritage Code number of the following, if in more than one group.)

- (1) **Black (Not of Hispanic Origin)**—All persons having origins from any of the black racial groups.
- (2) **Asian or Pacific Islanders**—All persons having origins from any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, Samoa, and India.
- (3) **American Indian or Alaskan Native**—All persons having origins from any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.
- (4) **Hispanic**—All persons of Mexican, Puerto Rican, Cuban, Central or South American, Iberian Peninsula, or other Spanish culture or origin, regardless of race.
- (5) **White (Not of Hispanic Origin)**—All persons having origins from any of the original peoples of Europe, North Africa, and the Middle East.

ALL INTERNATIONAL VISITORS

All international visitors for tax purposes must indicate if you are a Nonresident or Resident Alien at the bottom of the form. If you are not sure which category to check, review Section 4.E. or 5 of the UW1123 Alien Tax Information Request form. All new international visitors must submit the UW1123 with this form, which is located in the International Tax Packet on the Payroll web site at: www.payroll.uwm.edu

NOTE: If you receive money that should be tax free under a tax treaty, Resident Aliens should complete a form W-9 and Nonresident Aliens should follow the instructions below. All forms can be located on the website listed above.

INSTRUCTIONS FOR INTERNATIONAL NONRESIDENT ALIENS

- Marital Status** - Check Single, even if you are married.
- Exempt**—Check “No” International Nonresident Alien employees **cannot** claim exempt for either Federal or State Tax. **NOTE:** If you receive money that should be tax free under a tax treaty, complete either Form W-8BEN or W-9 if payment is a Fellowship or Form 8233 if payment is wages. The appropriate Revenue Procedure Statement 87-8 or 87-9 must also be completed and submitted with the 8233. (Refer to the website listed above to locate forms.)

Number of Allowances for Federal and Wisconsin State Tax - Enter "1" Allowance unless:

- You are from Canada or Mexico. If so, you will be taxed as Single, but may claim additional allowances for your dependents for both Federal and State purposes. Your dependents DO NOT need to live with you in the USA.
 - You are from Republic of Korea. If so, you will be taxed as Single, but may claim additional allowances for your dependents for both Federal and State purposes ONLY if your dependents live with you in the USA.
 - Students from India** – Per IRS regulations, the only Nonresident Aliens eligible to claim the Standard Deduction are Students from India. Write “India Student” in the ‘Additional Federal Tax to be Withheld’ box to claim this benefit.
- For more details on federal tax withholding, see IRS Publication 15 (Circular E), Employer’s Tax Guide.

INSTRUCTIONS FOR ALL OTHER PERSONS

- Exempt:** You are NOT eligible to claim exempt if:
 - You can be claimed as a dependent on someone else’s tax return and
 - Your non-wage income (interest on savings, etc) plus your wages are expected to be more than \$950 for Federal or \$900 for Wisconsin.
- Allowances:** Enter the allowances you can claim (IRS Pub. 919 available at www.irs.gov to help you figure the number of withholding allowances you can claim). In general you can claim one allowance for:
 - yourself, if no one else is claiming you as a dependent,
 - your spouse, if spouse does not work,
 - each dependent not claimed by someone else,
- If claiming "EXEMPT" from federal and/or state withholding you must leave the **Allowance Box** and the **Additional Tax Box** blank.
 - To DECREASE withholding, increase the number of allowances.
 - To INCREASE withholding, decrease the number of allowances
- Additional Tax**

If you want additional tax withheld: (1) estimate the yearly amount you will be under withheld; (2) divide the yearly amount by the number of pay periods remaining in the calendar year and enter the result in the Additional Tax to be Withheld blocks. For State tax, a Form WT-4A must be completed, if you are only claiming a fixed dollar amount. Additional tax withholding amounts are taken from every check.

Advance Earned Income Credit: Payments can be made to individuals who meet the qualifications listed on IRS Form W-5 available on the web at www.irs.gov. For more information contact the Payroll Office.