



STATE INCOME TAX WITHHOLDING FORM

Please read the tax information on this form to determine how it may apply to your benefit payment. For additional tax guidance, please consult a tax advisor or refer to the state tax authorities contact information on the back of this page. Complete the section(s) as they apply to your situation. Sign and date the form and return it to Midwest Institutional Trust Services at the address shown below.

For residents of AK, FL, HI, MT, NV, NH, ND, SD, TN, TX, WA, WY: There is either no withholding requirement for pension/annuity payments in your state or withholding services are not offered by Midwest Institutional Trust Services.

For residents of AL, AR, AZ, CA, CO, CT, DE, GA, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MN, MS, MO, NE, NJ, NM, NY, NC, OH, OK, OR, PA, RI, SC, UT, VT, VA, WV and WI complete applicable section below:

IF YOU'RE A RESIDENT OF MI, PLEASE CONTACT US FOR THE APPROPRIATE FORM. 1-800-342-2265

* If state withholding is calculated to be less than \$10.00, no withholding will be deducted based upon state regulations.

** If state withholding is calculated to be less than \$5.00, no withholding will be deducted based upon state regulations.

States Permitting Withholding on a Voluntary Basis

RESIDENTS OF AZ ONLY:

I want the following flat percentage amount, based on the taxable amount of distribution, withheld from my monthly retirement benefit.

I elect **not** to have AZ state income tax withheld from my pension and/or annuity. OR
I elect: .8 % 1.3% 1.8% 2.7% 3.6% 4.2% 5.1%
Additional amount to be withheld per distribution \$ _____

RESIDENTS OF AL, AR, CO, DE, ID, KS, KY, LA, MN, MS, NM, NC, OH, OR*, PA, RI, SC, UT, WV & WI** are subject to voluntary withholding. No withholding will be deducted unless requested.

I elect **not** to have state income tax withheld from my pension and/or annuity.
I want the following flat dollar amount withheld from my monthly pension: \$_____ OR
I elect to have state taxes calculated and withheld based upon the following elections:
 Single Married Married but withhold at a higher single rate Number of Allowances: _____

RESIDENTS OF CT*, IL, IN*, MD, MO*, NJ*, & NY** are subject to voluntary withholding. No withholding will be deducted unless requested.

I elect **not** to have state income tax withheld from my pension and/or annuity.
I want the following flat whole dollar amount withheld from my monthly pension: \$_____

States with Mandatory Withholding Requirements

RESIDENTS OF CA, GA, ME, MA, NE*, OK, VT and VA are subject to mandatory state withholding, however, an election out of Federal withholding qualifies as an election out of state withholding. Federal elections regarding marital status and allowances apply to state withholding unless other elections are noted below.

I have elected out of federal withholding so state withholding does not apply.
I want the following flat dollar amount withheld from my monthly pension: \$_____ OR
I elect to have state taxes calculated and withheld based upon the following elections:
 Single Married Married but withhold at a higher single rate Number of Allowances: _____

RESIDENTS OF IA are subject to mandatory state withholding at a minimum rate of 5% of the gross taxable distribution amount, however, an election out of Federal withholding qualifies as an election out of state withholding.

I have elected out of federal withholding so state withholding does not apply.

Signature of Participant

Social Security Number

Date

Home Phone Number

Please return this completed form to:

Diocese of Springfield
attn: Insurance Dept.
1615 W. Washington
Springfield, IL 62702-4757

Helpful Telephone Numbers For Taxpayers

Arizona	602-255-2060
Arkansas	501-682-2212
California	888-745-3886
Colorado	303-238-7378
Connecticut	800-382-9463
Delaware	302-577-8200
Georgia	404-656-4293
Illinois	800-732-8866
Indiana	317-233-4016
Iowa	515-281-3114
Kansas	877-526-7738
Kentucky	502-564-4581
Louisiana	225-925-4611
Maine	207-626-8475
Massachusetts	617-887-6367
Michigan	517-373-1837 OPT 3
Minnesota	800-652-9094
Missouri	573-522-1578
Nebraska	800-742-7474
New Jersey	609-292-6400
New Mexico	505-827-0700
New York	800-225-5829
Ohio	800-282-1780
Oklahoma	405-521-3160
Oregon	800-356-4222
Pennsylvania	717-787-1064
South Carolina	843-556-1780
Vermont	802-828-2551
Virginia	804-367-8038
West Virginia	800-982-8297

IRS ASSISTANCE 800-829-1040