



## Annuitant's Request for Income Tax Withholding

New York State • New York City • Yonkers

Print or type	First name and middle initial	Last name	Your Social Security number	
	Permanent mailing address (number and street or PO Box)		Apartment number	Annuity contract claim or identification number
	City, village, or post office		State	
Enter the <b>whole dollar</b> amount to be withheld from <b>each</b> annuity or pension payment:	<b>1</b> New York State income tax .....		<b>1</b>	
	<b>2</b> New York City income tax ( <i>if a New York City resident</i> ).....		<b>2</b>	
	<b>3</b> Yonkers income tax surcharge ( <i>if a Yonkers resident</i> ).....		<b>3</b>	
I request voluntary income tax withholding from my annuity or pension payments as authorized by Tax Law § 671(b).				
Signature of annuitant			Date	

For more information, see the instructions on page 2.

## Instructions

### Payee

#### Who may submit

If you receive an annuity or pension payment that you are required to include in your New York State adjusted gross income, you may use this form to voluntarily have New York State personal income tax withheld from **each** payment.

If you are a **New York City or Yonkers** resident, you may also choose to have that city's personal income tax withheld.

#### Requirements

The annuity or pension must be payable over **a period longer than one year**.

If you submit this form, you must request an amount that is **at least \$5 per month**.

You should not request a total amount of withholding that would reduce your annuity or pension payment to **less than \$10**.

#### Where and how to submit

Submit this form to the payer of your annuity or pension. On the front of the form, enter (in **whole dollars**) the amount of New York State (and, if applicable, New York City or Yonkers) income tax that you want withheld from **each** annuity or pension payment.

If you choose, you may make quarterly payments of estimated income tax in addition to, or instead of, withholding. For more information, see the instructions for Form IT-2105, *Estimated Tax Payment Voucher for Individuals*.

If you need help completing this form, call 518-457-5181.

#### Duration of withholding request

Your request for voluntary withholding will remain in effect until you ask your payer in writing to terminate it.

#### Statement of income tax withheld

After the end of the year, your payer will give you federal Form 1099-R, *Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.*, showing the gross distribution amount of annuity or pension payments and the total amount your payer deducted and withheld as personal income tax during the calendar year.

#### Payer

Keep this certificate with your records.

You **must** report and pay the New York State, New York City, and Yonkers personal income taxes that you withheld from annuity or pension payments. For payer responsibilities, see:

- instructions for Form NYS-1, *Return of Tax Withheld*
- instructions for Form NYS-45, *Quarterly Combined Withholding, Wage Reporting, and Unemployment Insurance Return*

#### Privacy notification

See our website at [www.tax.ny.gov](http://www.tax.ny.gov) or Publication 54, *Privacy Notification*.