

You should always submit a signed tax form to SCERA so that we know what, if anything, to withhold for you and your specific situation. If no form is submitted or the form is incorrect, we withhold at the required rate per California and the IRS. SCERA is unable to withhold taxes for any other state.

**California:** Married 3                      **IRS:** Single 0

**Federal Tax Form Instructions:**

**A. For no withholding:**

Must write “No Withholding” in the space below Step 4(c). Then, **ONLY** complete Steps 1a and 1b. **If you complete step 1c, the form must be corrected.**

**B. To have taxes withheld using your filing status and 0:**

You must complete all of step 1.

**C. To have taxes withheld using steps 2-4:**

You must complete all of step 1 and the following steps as applicable.

1. Step 2 – Part b

You must fill in (i) or (ii). Item (iii) must have the TOTAL populated. **If you leave any of these lines blank, your form must be corrected.**

2. Step 3

If completed, all of the lines must be populated and the TOTAL line must be completed. **If you leave any of these lines blank, your form must be corrected.**

3. Step 4

This step is optional and each line is not required. Complete only those that apply.

**California State Tax Form Instructions:**

**A. For no withholding:**

1. Must complete personal information.

2. You must mark the box on line 1. You **CANNOT** complete items 2-4. **If you populate lines 2-4, your form must be corrected.**

**B. To have taxes withheld:**

1. Must complete personal information and line 2a must be completed.

2. Mark **ONLY** one filing status. Single or Married; Married; Head of Household

3. Line 3 and 4 is optional, but should include a 0 if not electing a dollar amount.