

# **IRS W-4 FORM GUIDE**

## **Step 1: Personal Information**

- Enter your name, address, Social Security number
- Check Filing Status: *Single, Married and Filing Separately, Married and Filing Jointly, or Head of Household*

## **Step 2: Multiple Jobs or Spouse Works**

- If you have more than one job or you are *Married Filing Jointly* and have a working spouse, fill out step 2.
- If you work multiple jobs, check the box next to section **2(c)** and complete the Multiple Jobs Worksheet.
- <https://www.irs.gov/individuals/tax-withholding-estimator>

Only complete steps 3 through 4(b) for your highest paying job (you can leave those sections blank on your other W-4 forms).

## **Step 3: Claim Dependents**

- If you have dependents, you need to complete Step 3, which determines the eligibility for the child tax credit.
- If you are filing Single with an income of \$200,000 or less or Married Filing Jointly with a combined income of \$400,000 or less you can claim dependents on Form W-4.
  - If you have children under the age of **17**, multiply the number of children **by \$2000** and enter it into the first box on the worksheet.
  - For all other dependents, multiply **by \$500** and enter into the second box.
  - Then, add the values from the first and the second boxes and enter the total into **Line 3**.

## **Step 4: Other Adjustments**

- **Line 4a:** Other income (not from jobs). If you have additional income that isn't subject to withholding (*including interest, dividends, and retirement income*), enter that income on **Line 4a** and elect to have the additional amount withheld from your earnings to compensate.
- **Line 4b:** Deductions. If you expect your deductions to exceed the standard deduction (**which, for 2021, is \$12,550 for Single or Married Filing Separately, \$25,100 for Married Filing Jointly, or \$18,800 for Head of Household**), fill out the Deductions Worksheet on page 3 of Form W-4 and enter the result on **Line 4b**.
- **Line 4c:** Extra withholding. If you want to have additional tax withheld each pay period, enter the withholding amount on **Line 4c**.
- **EXEMPT**-If you would like to claim EXEMPT from all Federal tax withholding, write it below the **Line 4c** space.

## **Step 5: Sign the form**

- Sign and date the W-4 form before submitting it to Human Resources.