

W4 - TAX WITHHOLDING CHECKLIST

1. Filing Status: Single Married Married Separately Head of Household
 Qualifying Widow
2. Can someone else claim you as a dependent? Yes No
3. Do you have any dependents? Yes No If yes, number of dependents _____
4. Number of W2 for this year? _____
5. Will you receive income from a pension this year? If yes, \$ _____
6. Other Income: Social Security Scholarship or Grant Unemployment
 Self-Employed Dividends and Interest
 Estimated Tax Payment]
7. Will be turning 65 years old or older? Yes No
8. I am blind? Yes No
9. Total Wages you expect to receive this year (Gross Income): _____
10. How frequent are you paid? _____
11. On what date did your most pay period end? ____ / ____ / _____
12. Will you receive any bonuses for this tax year? If Yes, \$ _____
13. Using your last paystub statement, enter the total federal income taxes withheld?
Year to Date: \$ _____ Amount from last check: \$ _____
14. Will you contribute to a tax-deferred retirement plan, such as a 401(k)? Yes No
15. Will you contribute to an HAS, FSA, pre-tax childcare credit, cafeteria plan or other?
 Yes No
16. Will you have adjustments to Income? If yes, please enter amount! Otherwise jump to 16
Student Loan Interest: _____
Educator Expense: _____
IRA contributions: _____
HSA account: _____
Alimony Paid: _____
Penalty Early Withdraw _____
Business Credits: _____
17. Deductions from Income: Itemize deductions OR Standard Deductions
18. Tax credits from your tax obligation. Check all that applies, If none, form complete
 Child and Dependent related care
 Foreign Tax Credit
 Educational
 Retirement Savings
 Homeowner
 Elderly or Disabled
 Business – Self-Employed
 Alternative Minimum Tax
 Energy Efficient Vehicles