

There are two options to fill out a W-4 Form. In option one, you can choose to claim allowances (dependents) to be withheld for your taxes. In option two, you can choose to claim exempt. Below are examples of how to fill out both options.

Option 1

Separate here and give Form W-4 to your employer. Keep the top part for your records.

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 1545-0074
 Department of the Treasury Internal Revenue Service **2013**

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

1 Your first name and middle initial Last name 2 Your social security number

Home address (number and street or rural route)

City or town, state, and ZIP code

3 Single Married Married, but withhold at higher Single rate.
 Note. If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.

4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.

5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2) 5

6 Additional amount, if any, you want withheld from each paycheck 6 \$

7 I claim exemption from withholding for 2013, and I certify that I meet both of the following conditions for exemption.
 • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
 • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
 If you meet both conditions, write "Exempt" here 7

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) Date

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) 9 Office code (optional) 10 Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form W-4 (2013)

Everything in **yellow** **MUST** be filled out.

One of the 3 options **MUST** be selected in **box 3** (highlighted in red).

If you need assistance calculating the number of allowances (dependents), please visit the following link to the IRS website to use their Withholding Calculator at:

<http://www.irs.gov/Individuals/IRS-Withholding-Calculator>

In **box 5** please place the **number** of allowances (dependents) you are claiming to be withheld for your taxes.

You may also withhold an extra **dollar amount** in **box 6** if you choose. **(Not required)**

You may **NOT** claim **box 5** and **6** **WITH** **Box 7**.

Option 2

Separate here and give Form W-4 to your employer. Keep the top part for your records.

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 154-0074
 Department of the Treasury Internal Revenue Service **2013**

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

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Home address (number and street or rural route)

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5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2) 5

6 Additional amount, if any, you want withheld from each paycheck 6 \$

7 I claim exemption from withholding for 2013, and I certify that I meet both of the following conditions for exemption.
 • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
 • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
 If you meet both conditions, write "Exempt" here 7

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) Date

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) 9 Office code (optional) 10 Employer identification number (EIN)

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Everything in **yellow** **MUST** be filled out.

One of the 3 options **MUST** be selected in **box 3** (highlighted in red).

You may choose to select **box 7** if you wish. To do this you may **ONLY** choose **box 7** and **cannot** have anything in boxes 5 and 6. You must write **EXEMPT** in **box 7**.

If you have further questions on how to fill out your W-4 form, please contact Joanna Morgan in the Payroll department.
 Joanna Morgan Phone: (435)797-1059 Email: joanna.morgan@usu.edu