

# Sample updated W-4 form

Form <b>W-4</b> (Rev. December 2020) Department of the Treasury Internal Revenue Service		<b>Employee's Withholding Certificate</b>		OMB No. 1545-0074
		<p>▶ <b>Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.</b></p> <p>▶ <b>Give Form W-4 to your employer.</b></p> <p>▶ <b>Your withholding is subject to review by the IRS.</b></p>		<b>2021</b>
<b>Required Step 1</b>	<b>Step 1: Enter Personal Information</b>	(a) First name and middle initial	Last name	(b) Social security number
		Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to <a href="http://www.ssa.gov">www.ssa.gov</a> .
		City or town, state, and ZIP code		
		(c) <input type="checkbox"/> Single or married filing separately		
	<input type="checkbox"/> Married (including a surviving spouse) or Qualifying widow(er) <input type="checkbox"/> Head of household. Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.			
<p><b>Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5.</b> See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a>, and privacy.</p>				
Steps 2, 3 and 4 are <b>OPTIONAL</b> . Use Step 2 if there are multiple jobs or both spouses work. Use steps 3 and/or 4 if you want to adjust withholding so that it closely matches your actual tax liability.	<b>Step 2: Multiple Jobs or Spouse Works</b>	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.		
		Do only one of the following: (a) Use the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a> for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld. <input type="checkbox"/>		
<p><b>TIP:</b> To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.</p>				
<p><b>Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs.</b> Leave those jobs blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest-paying job.)</p>				
Line 4(b) should report deductions <b>OVER</b> the standard deduction amount. See the instructions.	<b>Step 3: Claim Dependents</b>	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 . . . . . \$ _____ Multiply the number of other dependents by \$500 . . . . . ▶ \$ _____ Add the amounts above and enter the total here . . . . . \$ _____		
	<b>Step 4 (optional): Other Adjustments</b>	(a) <b>Other income (not from jobs).</b> If you want tax withheld for other income you expect to receive this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . . \$ _____		
		(b) <b>Deductions.</b> If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . . .		<b>4(b)</b> \$ _____
		(c) <b>Extra withholding.</b> Enter any additional tax you want withheld each pay period . . . . .		<b>4(c)</b> \$ _____
<b>Required Step 5</b>	<b>Step 5: Sign Here</b>	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.		
		Employee's signature (This form is not valid unless you sign it.)		Date
<b>Employers Only</b>	Employer's name and address	First date of employment	Employer identification number (EIN)	

Note: If you use this box, each spouse should check the box on their Form W-4. But **ONLY** one spouse should complete lines 3 through 4(b).

Step 3 is **NOT** for claiming exemptions. Using this section will have a direct impact on your tax return and may drastically reduce your refund and/or cause you to owe the IRS. See detailed

Lines 3, 4(a) and 4(b) are **FULL-YEAR** amounts. Line 4(c) is a **PER-PAYROLL** amount.