

# W-4 Form—Employee's Withholding Allowance Certificate

## See Reverse Side Instructions

**Please Type Data Below.** This is a tax form. Do not use this form for an Address Change only (please see the Campus/Home Address Change form UW1035 available at <http://www.bussvc.wisc.edu/ecbs/pay-employee-information-uw1035.pdf>.) On every W-4 form you submit you must indicate your marital status and exemption status or it will be assigned to Single with zero exemptions

<b>U.S. Social Security Number</b> - -					
<b>Name: Last</b>		<b>First</b>		<b>M.I.</b>	<b>Birthdate</b> (mm/dd/yyyy) / /
<b>Gender</b> <input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Marital Status—For Tax Withholding</b> (check only one) <input type="checkbox"/> Single (or married but legally separated) <input type="checkbox"/> Married <input type="checkbox"/> Married but withhold at higher Single rate Note: All <b>Nonresident Aliens</b> are required to check Single (see additional instructions on reverse side)				
<b>Is your ethnicity Hispanic/Latino?</b> (See definitions on reverse side.) <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>Heritage Code</b> (See definitions on reverse side.) <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5		<b>Wisconsin County Employed</b>	
<b>Exempt (Exempt status expires annually on February 15). International Nonresident Alien employees cannot claim exempt.</b> I claim exemption from withholding this year. I certify that I meet <b>BOTH</b> of the following: <ul style="list-style-type: none"> <li>▪ Last year I had a right to a refund of <b>ALL</b> income tax withheld because I had <b>NO</b> tax liability; <b>AND</b></li> <li>▪ This year I expect a refund of <b>ALL</b> income tax withheld because I expect to have <b>NO</b> tax liability</li> </ul> <b>AND</b> that I do not meet the conditions listed on the reverse side. <b>EXEMPT for Federal Tax:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>EXEMPT for Wisconsin State Tax:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>If you have checked yes in one of these boxes, do NOT enter any amounts in the Federal and/or Wisconsin State Tax blocks.</b>					
<b>Non-Resident of Wisconsin</b> I declare that while working in Wisconsin, I am a legal resident of the state indicated below, and that I am not subject to Wisconsin income tax withholding in accordance with a reciprocal tax agreement. Check appropriate box: <div style="text-align: center;"> <input type="checkbox"/> Indiana   <input type="checkbox"/> Illinois   <input type="checkbox"/> Michigan   <input type="checkbox"/> Kentucky         </div> <b>For Minnesota residents working in Wisconsin, read the 2010 Minnesota Reciprocity section of the instructions.</b> <b>If you have checked one of these boxes, do NOT enter any amounts in the Wisconsin State Tax blocks.</b>					
<b>FEDERAL TAX</b>			<b>WISCONSIN STATE TAX</b>		
<b>Number of Allowances for Federal Tax</b> (leave blank if claiming exempt):	<b>Additional Federal Tax to be Withheld:</b> \$		<b>Number of Allowances for State Tax</b> (leave blank if claiming exempt):	<b>Additional State Tax to be Withheld:</b> \$	
<b>My UW work is performed outside of Wisconsin and I reside outside of Wisconsin and I am not a Wisconsin resident.</b> USA State or foreign country of Residence: USA State or foreign country where work is performed: U.S. Citizens working outside of the U.S. may qualify for exemption from state and federal income tax by filing <a href="#">IRS Form 673</a> .					
<b>U.S. Home Telephone</b> - (area code/number) (   ) -					
<b>U.S.</b> →	<b>Street</b>	<b>Apt. No.</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
<b>Foreign</b> →	<b>Street</b>	<b>Apt. No.</b>	<b>City</b>		<b>Postal Code</b>
	<b>Province</b>	<b>Country</b>		<b>Postal Code</b>	
<b>Address Release</b> -- My home mailing address and telephone number may be made available for the staff directory and released to the public upon request. <input type="checkbox"/> Yes <input type="checkbox"/> No					
Under the 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. (This form is not valid unless you sign it.)					
<b>Date</b> (mm/dd/yyyy)		<b>Employee Signature</b>			

### All International Visitors Complete the Following - See reverse side

For tax purposes, check one box (see instructions on reverse) <b>Nonresident Alien</b> <input type="checkbox"/> <b>Resident Alien</b> <input type="checkbox"/>	<b>Visa Type</b> (If permanent resident with a Green Card, write "Green Card" and date issued.)	<b>Country of Residence</b>	<b>Date of Arrival in U.S.</b> (mm/dd/yyyy) / /
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## GENDER AND HERITAGE CODE

Supplying this information is voluntary. The information will be treated as confidential and will not be disclosed in response to a public records request. It will be used for affirmative action reporting and related University purposes.

Ethnicity is considered Hispanic/Latino if a person is of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

Please check the corresponding box on the reverse side. Please identify yourself as one or more of the following races:

- 1) **Black or African American** – A person having origins in any of the black racial groups of Africa.
- 2) **Asian** – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- 3) **American Indian or Alaska Native** – A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.
- 4) **White** – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- 5) **Native Hawaiian or other Pacific Islander** – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

## ALL INTERNATIONAL VISITORS

All International visitors for tax purposes must indicate if they are a Nonresident or Resident Alien at the bottom of the form. If you are not sure which category to check, review Section 4.E. or 5 of the [UW1123 Alien Tax Information Request](#) form. All new International visitors must submit the UW1123 with this form.

**NOTE:** If you receive money that should be tax free under a tax treaty, Resident Aliens should complete a [Form W-9](#) and Nonresident Aliens should follow the instructions below. All forms can be located within the International Tax Packet, located at: <http://www.bussvc.wisc.edu/ecbs/itx-international-tax-packet-sc-uw1469.pdf>.

### INSTRUCTIONS FOR INTERNATIONAL NONRESIDENT ALIENS

- Marital Status** - Check "Single", or if you are married, check "Married but withhold at higher Single rate".
  - Exempt** - Check "No". International Nonresident Alien employees **cannot** claim exempt for either Federal or State Tax.  
**NOTE:** If you receive money that should be tax free under a tax treaty, complete either [Form W-8BEN](#) if payment is a Fellowship or [Form 8233](#) if payment is for wages. The appropriate Revenue Procedure Statement, [87-8](#) or [87-9](#), must also be completed and submitted with the 8233.
  - Number of Allowances for Federal and Wisconsin State Tax** - Enter "1" Allowance unless:
    - You are from Canada or Mexico. If so, you will be taxed as Single, but may claim additional allowances for your dependents for both Federal and State purposes. Your dependents DO NOT need to live with you in the USA.
    - You are from the Republic of Korea. If so, you will be taxed as Single, but may claim additional allowances for your dependents for both Federal and State purposes ONLY if your dependents live with you in the USA.
  - Students from India** – Per IRS regulations, the only Nonresident Aliens eligible to claim the Standard Deduction are Students from India. Write "India Student" in the 'Additional Federal Tax to be withheld' box to claim this benefit.
- For more details on federal tax withholding, see [IRS publication 15 \(Circular E\), Employers Tax Guide](#).

### INSTRUCTIONS FOR ALL OTHER PERSONS

- Exempt:** You are NOT eligible to claim exempt if:
  - You can be claimed as a dependent on someone else's tax return, and
  - Your non-wage income (interest on savings, etc.) plus wages are expected to be more than \$950 for Federal or \$950 for Wisconsin.
- Allowances:** Enter the allowances you can claim. ([IRS Pub. 919](#) will help you figure the number of withholding allowances you can claim). In general you can claim one allowance for:
  - yourself, if no one else is claiming you as a dependent,
  - your spouse, if your spouse does not work,
  - each dependent not claimed by someone else,
  - If claiming "EXEMPT" from federal and/or state withholding you must leave the Allowance Box blank.
  - To DECREASE withholding, increase the number of allowances.
  - To INCREASE withholding, decrease the number of allowances.
- Additional Tax**  
If you want additional tax withheld: (1) estimate the yearly amount you will be under withheld; (2) divide the yearly amount by the number of pay periods remaining in the calendar year and enter the result in the Additional Tax blocks. For State tax, a [Form WT-4A](#) must be completed, if you are only claiming a fixed dollar amount. Additional tax withholding amounts are taken from every check.

**Advance Earned Income Credit:** Payments can be made to individuals who meet the qualifications listed on [IRS Form W-5](#). For more information contact your Payroll office.

**2010 Minnesota Reciprocity:** Effective for taxable years beginning after December 31, 2009, the income tax reciprocity agreement between Minnesota and Wisconsin was terminated.

On January 1, 2010, the University of Wisconsin will begin withholding Wisconsin income taxes from your personal service income such as salaries, wages, commissions and fees earned. Minnesota income taxes will not be withheld from that income.

If you have additional questions, open the following link: <http://www.revenue.wi.gov/faqs/ise/mnrecipro.html>.

## REFERENCE PAGES

All IRS forms mentioned on this page can be found at <http://www.irs.gov>.

For additional tax information, visit <http://www.bussvc.wisc.edu/uwpc/uwpc-taxes-menu.html>.  
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