

Tax Election Change Form

Name (Required)

Full SSN (Required)

BNY Mellon Acct Number(s) or Company Retired From

Federal law requires you to make a withholding election regarding your pension benefit. You can elect to have no withholding. Your election (or automatic withholding) will remain in effect until you change it. If you elect not to have income tax withheld, you are responsible for payment of any income tax due. You may also be subject to tax penalties if your payments of estimated tax and/or withholding, if any, are not adequate.

FEDERAL TAX ELECTION

Complete Federal Election column W-4P. One option in the first box is REQUIRED. (See website irs.gov for form specific instructions)

W-4P Elections (Pension and Annuity Payments)

NO Withholding

Single or Married filing separately

Married filing jointly

Head of household

Income from a Job and/or Multiple Pensions/Annuities (Including a Spouse's Job/Pension/Annuity) – Total amount

\$ _____ (W-4P Step 2)

Claim Dependent and Other Credits - Total amount

\$ _____ (W-4P Step 3)

Other Income (not from jobs or pension/annuity payments).

\$ _____ (W-4P Step 4a)

Other Deductions

\$ _____ (W-4P Step 4b)

Extra Withholding

\$ _____ (W-4P Step 4c)

STATE TAX ELECTION

NO Withholding

Withhold **married** with _____ allowances

Withhold **single** with _____ allowances

Withhold at above rate plus an additional amount \$ _____ or additional percentage _____%

Withhold ONLY a flat amount \$ _____ or flat percentage _____%

I understand that the changes to my address and/or tax elections may take two payment cycles to become effective upon receipt of this form.

Signature

(Signature REQUIRED for processing)

Date

Benefit Disbursements - BNYM, PO Box 360534, Pittsburgh, PA 15251-6534

bdpensionphone@bnymellon.com