

# EMPLOYEE WAGE WITHHOLDING ALLOWANCE CALCULATION SHEET

## Payroll Department Setup Form

Employee Name: \_\_\_\_\_ Tax Year: \_\_\_\_\_

SSN / ID: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Filing Status: ☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household

### SECTION 1: PERSONAL ALLOWANCES WORKSHEET

Complete this section to determine the number of withholding allowances to claim. Leave any lines blank that do not apply to your tax situation.

| Line | Description of Allowance Claimed                                                                        | Allowances |
|------|---------------------------------------------------------------------------------------------------------|------------|
| A    | Enter "1" for yourself if no other person is claiming you as a dependent                                |            |
| B    | Enter "1" if you are married, have only one job, and your spouse does not work                          |            |
| C    | Enter "1" for your spouse if your spouse is not claiming themselves on another form                     |            |
| D    | Enter the number of dependents (other than your spouse or yourself) you will claim                      |            |
| E    | Enter "1" if you will file as head of household on your tax return                                      |            |
| F    | Child/Dependent Care Expenses: Enter "1" if you expect to incur at least \$2,000 of qualifying expenses |            |
| G    | <b>Total Personal Allowances: Add lines A through F and enter total here</b>                            |            |

### SECTION 2: DEDUCTIONS AND ADJUSTMENTS (OPTIONAL)

Complete this section only if you plan to itemize deductions, claim certain federal/state adjustments, or have significant non-wage income.

|   |                                                                                                             |  |
|---|-------------------------------------------------------------------------------------------------------------|--|
| 1 | Enter an estimate of your itemized deductions for the current tax year                                      |  |
| 2 | Enter the standard deduction amount based on your filing status                                             |  |
| 3 | Subtract line 2 from line 1. (If zero or less, enter "0")                                                   |  |
| 4 | Enter an estimate of your adjustments to income (e.g., deductible IRA contributions, student loan interest) |  |
| 5 | Add line 3 and line 4. Enter total                                                                          |  |
| 6 | Divide the amount on line 5 by \$4,300 (drop any fraction) to find additional allowances                    |  |
| 7 | <b>Total Combined Withholding Allowances: Add lines G (Section 1) and 6. Enter here</b>                     |  |

### SECTION 3: EMPLOYEE CERTIFICATION & SIGNATURE

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, the number of withholding allowances claimed does not exceed the amount to which I am entitled.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### FOR EMPLOYER / PAYROLL DIVISION USE ONLY

Employer Name: \_\_\_\_\_ EIN: \_\_\_\_\_

Date Received: \_\_\_\_\_ Effective Date: \_\_\_\_\_

Allowances Entered: \_\_\_\_\_ Processed By: \_\_\_\_\_