

OPERATING ENGINEERS TRUST FUNDS



I.U.O.E. LOCAL 12 HEALTH & WELFARE / PENSION / VACATION / TRAINING

100 CORSON STREET, SUITE 100 • PASADENA, CALIFORNIA 91103 • (866) 400-5200

P.O. BOX 7063, PASADENA, CALIFORNIA 91109

TTY: (626) 356-3582 WEBSITE: www.oefi.org

Tax Withholding Election for Monthly Pension Payments

Personal Information			
Social Security Number/OE ID	Last Name	First Name	Middle Initial
Address Information			
Street Address			
City		State	ZIP Code
Home Phone Number ()	Mobile Phone Number ()	Email Address	
Federal Income Tax Withholding			
<p>A () Do NOT withhold Federal Income Tax from my monthly pension.</p> <p>B () Please withhold Federal Income Tax from my monthly pension.</p> <p>C () Please withhold a flat dollar amount of \$_____per month from my pension.</p>			
<p>If you have checked Box "B", please download the W-4P Withholding Certificate. Until and unless we receive a Withholding Certificate from you showing something different, we will assume you are married and entitled to three exemptions in order to compute the amount of tax that will be withheld from your benefit payments.</p>			
California State Income Tax Withholding (California Residents Only)			
<p>A () Do NOT withhold California State Income Tax from my pension.</p> <p>B () Please withhold California State Income Tax from my pension</p> <p>C () Please withhold a flat dollar amount of \$_____per month from my pension.</p>			
<p>If you have checked Box "B", please download the W-4P Withholding Certificate. Until and unless we receive a Withholding Certificate from you showing something different, we will assume you are married and entitled to three exemptions in order to compute the amount of tax that will be withheld.</p>			
Signature (required)			
<p>X _____</p>			Date ____/____/____

Please return to Operating Engineers Trust Funds, PO Box 7063, Pasadena, CA 91109