

Payroll Services Branch provided two links courts may share with their employees:

<https://www.irs.gov/individuals/tax-withholding-estimator>

<https://www.youtube.com/watch?v=1AidmxJ1O9U>

Additional instructions to completing the W-4 are attached.

# How to Fill Out a W4

The first thing that you need to know, is that the easiest way to fill out the form is to use the [IRS's withholding estimator](#).

## Step 1: Enter your personal information (Required)

Form <b>W-4</b> Department of the Treasury Internal Revenue Service	<b>Employee's Withholding Certificate</b>		OMB No. 1545-0074
	▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.		
<b>Step 1:</b> <b>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 filing jointly (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.)		

@thefinancetwins

This step is self-explanatory. The only thing that might be less straightforward is step 1c, which is where you need to select your filing status.

Your tax filing status refers to how you will file your taxes at the end of the 2020 tax year. So if you are single and don't expect to get married this year, you'll file taxes Single.

## Step 2: Multiple Jobs or Spouse Works (Optional)

<b>Step 2:</b> <b>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 <b>only one</b> of the following. <b>(a)</b> 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); <b>or</b> <b>(b)</b> Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; <b>or</b> <b>(c)</b> 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"/> <b>TIP:</b> To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.
--	---

@thefinancetwins

Steps 2 through 4 is that you ONLY need to fill them out IF they apply to you.

That means that if none of the steps apply to you, you can skip straight to Step 5 to sign the form and you have completed your form.

Complete step 2 if you (1) hold more than one job at a time, or (2) are married filing jointly, and your spouse also works.

Alternatively, if your household only holds two jobs in total, and both have similar pay, you can check the box for Step 2(c) and proceed to Step 3.

### Step 2(b): Use the Multiple Jobs Worksheet

If you prefer not to use the estimator tool or you can't get it to work, you can use the multiple jobs worksheet. Follow the instructions on the Form and input the final result in Step 4(c) as an extra withholding.

### Step 3: Claim Dependents (Optional)

<p><b>Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs.</b> Leave those steps 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>		
<b>Step 3:</b>	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):	
<b>Claim Dependents</b>	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>3</b> \$ _____

@thefinancetwins

Like Step 1, Step 3 is also relatively simple. If your income will be \$200,000 or less (\$400,000 or less if married filing jointly), follow the steps listed in the Form.

As an example, let's assume your household income will be \$300,000, you will file married filing jointly, you have three kids under the age of 17, and you also support your elderly mother financially.

Under this example, your total for step 3 will be \$6,500. This is because you have three qualifying children, so  $3 \times \$2,000 = \$6,000$ . You also have one other dependent, which gives you an additional \$500. As a result,  $\$6,000 + \$500 = \$6,500$ .

### Step 4: Other Adjustments (Optional)

<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 this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . .	<b>4(a)</b> \$ _____
	(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> \$ _____

@thefinancetwins

Follow the directions for Step 4(a) if you have non-job income for which you'd like to have tax withheld.

### Step 4(b)

Use the Deductions Worksheet on Page 3 if you are NOT expecting to claim the standard deduction. If you aren't sure what this means, then you are likely going to claim the standard deduction. If you aren't sure, you can use last year's taxes as a guide or as your accountant.

Step 4(c) was already discussed above in Step 2(b) with regards to the Multiple Jobs Worksheet.

### Step 5: Sign Here

<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.
	<b>Employee's signature</b> (This form is not valid unless you sign it.) <b>Date</b>

@thefinancetwins

Step 5 is required to complete and submit your 2020 W4 Form, and you simply need to sign and date the Form.