



# Teachers Retirement Association

60 Empire Drive • Suite 400 • St. Paul, MN 55103-4000  
 651.296.2409 • 800.657.3669 • 651.297.5999 FAX • 800.627.3529 TTY

Submit to TRA by mail or FAX (original is not required).

## Federal and State Tax Withholding Certificate

Your information				
Name			TRA Number	
Address				
City		State		Zip Code
Phone		Email		
Section 1. Your accounts				
Are you a <input type="checkbox"/> TRA member <input type="checkbox"/> Beneficiary of a member				
The withholding designations apply to the following accounts: <input type="checkbox"/> TRA <input type="checkbox"/> Minneapolis <input type="checkbox"/> Duluth <input type="checkbox"/> All plans <i>If no box is checked, the designation applies to only the largest account.</i>				
Section 2. FEDERAL Withholding designations				
Choose one to indicate how you want federal taxes withheld from your monthly pension payment. If you do not specify, TRA is required by law to assume a status of married with three allowances.				
1.	Do not withhold income tax. <i>(Do not complete lines 2 or 3.)</i>			<input type="checkbox"/>
2.	Withhold federal income tax based on the tax tables from each payment to be calculated using the number of allowances and marital status shown. <i>(Do not complete line 1.) You may designate an additional dollar amount on line 3.</i> Marital status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher single rate			_____ (Enter number of allowances)
3.	Indicate an <u>optional additional amount</u> to be withheld based on the federal tax tables. <i>You must indicate your marital status and the number of allowances on line 2.</i>			\$
Section 3. MINNESOTA STATE Withholding designations				
Choose one to indicate how you want Minnesota state taxes withheld from your monthly pension payment.				
1.	Do not withhold Minnesota state income tax. <i>(Do not complete lines 2, 3 or 4.)</i>			<input type="checkbox"/>
2.	Withhold Minnesota state income tax based on the tax tables from each payment to be calculated using the number of allowances and marital status shown. <i>(Do not complete lines 1 or 4.) You may designate an additional dollar amount on line 3.</i> Marital status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher single rate <i>Marital status must be the same as federal; allowances must be lower or equal to federal tax allowances.</i>			_____ (Enter number of allowances)
3.	Indicate an <u>optional additional amount</u> to be withheld based on the state tax tables. <i>You must indicate your marital status and the number of allowances on line 2.</i>			\$
4.	I elect to have this amount withheld from each payment. <i>(Do not complete lines 1,2 or 3)</i>			\$
Section 4. Your signature				
				Date



## Federal and State Tax Withholding Instructions

You can verify and change your current withholding designations on the TRA website (MinnesotaTRA.org) through your *MyTRA* account. If you need assistance, contact TRA.

If you prefer to submit this paper form, sign and return it to TRA. In addition,

- If you are a permanent resident of the state of Minnesota, complete the Minnesota withholding section. If you are a permanent resident of another state that will tax your annuity, your tax payment arrangements must be made with that state. **TRA does not withhold taxes for any other state**
- If you become a resident of another state and no longer require Minnesota withholding, you must inform our office in writing.
- Any previous designations are replaced when you submit a new form.
- Allow enough time for the form to reach our office by the 15<sup>th</sup> of the month prior to the month the change should begin.

### Federal Withholding

You have three options for your federal tax withholding:

- No tax withholding
- Withholding of an amount of tax determined by current IRS tables.
- Withholding of an extra dollar amount **in addition** to that determined by the tax tables.

### Minnesota State Withholding

You have four options for your Minnesota tax withholding:

- No tax withholding
- Withholding of an amount of tax determined by current Minnesota tax tables.
- Withholding of an extra dollar amount **in addition** to that determined by the Minnesota tax tables.
- Withholding of a specific dollar amount.

### Please Remember

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- Indicate the account(s) for which you are making the tax designation: TRA, Minneapolis, Duluth or all plans.
- Your marital status for both federal and state tax withholding must be the same.
- Your state tax allowances must be lower or equal to your federal tax allowances. **Your state tax allowances cannot be greater than your federal allowances.**
- Your form completely replaces any previous form.

If you have any questions, visit us at [www.MinnesotaTRA.org](http://www.MinnesotaTRA.org) or contact TRA at 651-296-2409 or 800-657-3669.