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The following information is being provided to explain how to modify your federal or state withholding elections for benefit payments you are receiving from Wespath-administered plans.

### Change your Withholding Elections Online

Updating your tax withholding via the [Benefits Access website](#) is good for you and for the environment.



**Save time**—data is updated immediately, whereas paper updates take a minimum of 5 business days, including mail time and processing



**Improve accuracy**—eliminating the need to decode handwriting



**Save effort**—only have to update the information that has changed, rather than reentering all of your data



**Help the environment**—eliminating paper and ink waste and avoiding CO<sub>2</sub> emissions from mailing

To update your tax withholding on the [Benefits Access website](#)—log in and select **Take Action>Manage Distributions>View Annuity Details**.

Wespath also provides tax forms for participants who cannot access the Internet. Paper forms can be downloaded using the links below, or you can request this form be sent to you at no charge by calling us at **1-800-851-2201**. Representatives are available business days from 8:00 a.m. to 6:00 p.m., Central time.

Submit completed forms to Wespath by (choose one):



**E-mail**  
[distributionteam@wespath.org](mailto:distributionteam@wespath.org)



**Mail**  
**Wespath Benefits and Investments**  
Attn: Distributions Team  
1901 Chestnut Ave.  
Glenview, IL 60025



**Fax**  
**1-847-866-2736**

## Tax Forms and Tables

### **[IRS Form W-4P](#)—for updating federal withholding elections**

*Form W-4P* is for U.S. citizens, resident aliens or estates receiving pensions and annuities. It is used to notify Wespath Benefits and Investments (Wespath) of your elected amount of federal income tax to withhold from benefit payments. If you are currently receiving benefit payments that are expected to last at least 10 years or are being paid over your life expectancy, you have the right to revoke or change your withholding election by submitting a new *IRS Form W-4P* to Wespath. Generally, the IRS does not provide an updated form for the following year until late December. Elections made using the prior year's form will be accepted. If Wespath receives your *Form W-4P* by the 15th day of the month, your election will be applied to the next month's benefit payment. Otherwise, it will be applied to the payment for the month following the next month.

**If you do not wish to make any withholding changes, you do not need to submit a new *Form W-4P*.** If you haven't submitted a *Form W-4P* and your benefit is at least the statutory amount, we will withhold as though you are married and claiming three allowances.

### **[State Income Tax Withholding Form](#)—for updating state withholding elections**

If you wish to change your state income tax withholding election, update this information online or submit a new form to Wespath.

### **[Special Tax Notice Regarding Distributions](#)—for participants who receive a rollover-eligible distribution**

If you receive a rollover-eligible distribution from a Wespath-administered retirement plan, Wespath is required to provide you with a *Special Tax Notice Regarding Distributions*. This notice explains the rules for direct rollovers and mandatory income tax withholding on distributions not directly rolled over. A rollover is a distribution of all or part of your benefit either paid directly to another plan (or IRA) or indirectly to you. This notice also contains important information to consider when deciding in what form to receive a retirement plan distribution.

### **[Tax Withholding Tables](#)**

Please note that the IRS and individual states may update the federal and state tax withholding tables. These changes will be applied as soon as administratively possible.

Additional information and links to tax forms are also available on the Wespath website [tax information page](#).

a general agency of The United Methodist Church



[wespath.org](http://wespath.org)

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To contact Wespath Benefits and Investments, [click here](#).