

**IU 18/20 RETIREMENT PLAN**

FEDERAL &amp; STATE INCOME TAX DEDUCTIONS

**SECTION 1—PARTICIPANT INFORMATION**

Name:		University 10-Digit ID:
Phone:	Retirement Date:	

**SECTION 2—DEDUCTIONS**

1. As of my retirement date, I will remain a resident of Indiana. Please continue my Federal and Indiana state and county income tax withholdings as they currently are in the IU system.

2. I will remain a resident of Indiana and wish to change my Federal and/or Indiana state and county income tax withholdings (Choose option A or B for both Federal and State income tax withholdings and complete any necessary forms).

**Federal Income Tax Withholding:**

Option A - Continue my current Federal income tax withholdings as they currently are in the IU system.

Option B - Change my Federal income tax withholding - I have enclosed IRS form W-4.

**Indiana State & County Income Tax Withholding:**

Option A - Continue my current Indiana state & county income tax withholdings as they currently are in the IU system.

Option B - Change my Indiana state & county income tax withholding - I have enclosed State of Indiana form WH-4.

3. Upon my retirement from IU, I will become a resident of the state of \_\_\_\_\_.

**Federal Income Tax Withholding:**

Option A - Continue my current Federal income tax withholdings as they currently are in the IU system.

Option B - Change my Federal income tax withholding - I have enclosed IRS form W-4.

**State & County Income Tax Withholding:**

Option A - I have enclosed a state income tax withholding form for my new state of residence.

Option B - I will be responsible for making any state income tax payments on my own as necessary and wish to have no state income tax withholding.

**SECTION 3—PARTICIPANT SIGNATURE**

I understand that I am responsible for ensuring my income tax withholding is correct for my personal tax situation.

Signature:	Date:
------------	-------

*To sign and submit this form digitally you must first save it to your device.*

*This form can also be sent to [askhr@iu.edu](mailto:askhr@iu.edu); or mailed to IU Human Resources, ATTN: 18/20 Retirement, 2709 E. 10th Street, Ste 321, Bloomington, IN 47408.*