Complete this form and send to Colorado PERA at the address or fax number above if you are a PERA benefit recipient and want to set up or change your income tax withholding. Correctly completed forms received at PERA by the 15th of the month will be effective for that month. This form can also be completed online at www.copera.org using your User ID and password.

» If you receive more than one PERA benefit, it is important to specify in the check boxes below to which account(s) these changes apply.
If you have different withholding preferences for each account, you must complete a separate form for each.

To which account(s) would you like your withholding preferences to apply? (Check all that apply)

PERA Benefit Structure Account(s): □ Retirement □ Cobeneficiary/Survivor □ Other:_____________________

DPS Benefit Structure Account(s): □ Retirement □ Cobeneficiary/Survivor □ Other:_____________________

Your Information

Your Name ____________________________

Last First MI

Address ____________________________________________________________

Street, Route, or Box Number City State ZIP Code

Daytime Telephone ( ) Email Address ________________________________

Sign up for electronic delivery of PERA information?    Yes □ No □

I understand that as a PERA benefit recipient, I am responsible for payment of income taxes, interest, and penalties if my federal or state income tax withholding is not sufficient. I also understand that PERA cannot refund any taxes withheld in error.

Sign Here ➔ Signature _____________________________________________ Date ____________

Marital Status on Form W-4P: □ Single □ Married □ Married, but withhold at higher Single rate

Number of allowances:___________

Federal Income Tax Withholding (Check one)

If no instructions are given for your federal income tax withholding, PERA is required to withhold at the rate of a married individual claiming three allowances.

1. □ Do not withhold federal income tax.
2. □ Calculate my federal income tax withholding in accordance with the IRS tax tables.*
   (Optional) Withhold the calculated amount plus $_________.
3. □ Withhold $______________ from my monthly benefit (must be a whole dollar amount).
4. □ Withhold ____________ percent (%) from my monthly benefit (must be a whole percentage).*

Colorado State Income Tax Withholding (Check one)

If you have Colorado state income taxes deducted and move out of state, you must instruct PERA to stop deducting these taxes. All withheld Colorado state income tax is rounded to the nearest whole dollar.

1. □ Do not withhold Colorado state income tax.
2. Calculate my Colorado state income tax withholding using the Colorado tax tables:
   □ Without the pension exclusion ($20,000 or $24,000). See page 6.
   (Optional) Withhold the calculated amount plus $______________ from my monthly benefit.
   □ With the pension exclusion ($20,000 or $24,000). See page 6.
   (Optional) Withhold the calculated amount plus $______________ from my monthly benefit.
3. □ Withhold $______________ from my monthly benefit (must be a whole dollar amount).
4. □ Withhold ________________ percent (%) from my monthly benefit (must be a whole percentage).*

* Rounded to the nearest whole dollar.