

How to Fill Out a W4

Step 1: Read the profile below and underline all the information that would be used to fill out a W-4.

Step 2: Take the information you highlighted and use it to fill in the W-4 given to you with this worksheet.

S. Doesitall

L. Refundez

T. Withholder

C. Earnsomore

CONFIDENTIAL FILE



Name: Sandy Z. Doesitall

Age: 28

Place of Birth (POB):

San Diego, California

Date of Birth (DOB):

June 29, 1993

Current Address:

55 S. 3000 E. Rome, WI. 54494

Social Security Number (SSN):

000-52-4956

Status: Single

of Children: 0

of Pets: 3

Previous Jobs: 4

Current Jobs: 0

Failed Jobs: 10

(the number would be greater if they included rain-drop catching as a career path).

Character Description: Aspiring dancer, artist, theatre geek, and gymnast. Loves fishing, biking, running, jumping, diving, cooking, eating, underwater basket weaving, and standing on their head. Hates clouds. Listens to all types of music but only ever listens with the volume at 12%—no more, no less. Never disagrees with anyone unless they say something that's disagreeable. Has a great deal of patience, but can't tolerate indecisiveness. Some might call this hypocrisy—they call it intuitiveness—don't ask them why.

DEFINITIONS

Deductions

A reduction to the amount of taxable income you make in a year. Most people take the standard deduction, which is a set dollar amount based on your filing status. You can also itemize, which subtracts specific deductions individually. Sandy is claiming the standard deduction.

Dependents

A person you claim (say that you take care of) on your taxes other than your spouse. Most dependents are children or family members. Pets do not count as dependents.

Withholdings

The amount of money taken directly from your paycheck toward taxes. If you choose to take out extra withholdings, you're more likely to get a large refund at tax time rather than owe money. Sandy is not having any extra money withheld.

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

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.

OMB No. 1545-0074

2024

Step 1: Enter Personal Information	(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 www.ssa.gov .
	City or town, state, and ZIP code			
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying surviving spouse <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.)			

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, and when to use the estimator at www.irs.gov/W4App.

Step 2: Multiple Jobs or Spouse Works	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 only one of the following. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4). If you or your spouse have self-employment income, use this option; or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or (c) 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 generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate <input type="checkbox"/>
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Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. 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.)

Step 3: Claim Dependent and Other Credits	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 \$ _____ Multiply the number of other dependents by \$500 \$ _____ Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here		3	\$
	Step 3: (optional) Other Adjustments	(a) Other income (not from jobs). 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	4(a)	\$
		(b) Deductions. 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	4(b)	\$
(c) Extra withholding. Enter any additional tax you want withheld each pay period		4(c)	\$	

Step 3: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. _____ Employee's signature (This form is not valid unless you sign it.) <div><div>_____ Date</div></div>		
Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)

For educational purposes only.