

Carpenters Retirement Plan of Western Washington
Carpenters of Western Washington Individual
Account Pension Plan

PO Box 1929 Seattle WA 98111-1929

Federal Income Tax Withholding

Instructions

1. Please complete this form in its entirety.
2. All payments from the two retirement plans are considered taxable income.
3. The Trust Office will provide you with a *1099-R* form in January of each year. This form indicates the gross distribution from each plan for the preceding tax year and the amount withheld for income tax purposes (if applicable). A copy of this form is also provided to the IRS.
4. Please return the completed form to the Trust Office when you return your *Election of Retirement Benefits* form.

Carpenters Retirement Plan

- I do *not* want to have federal income tax withheld from my monthly benefit.
- I want federal income tax withheld from my monthly benefit. If you check this option, please indicate the amount you want withheld each month.

Amount you want withheld each month: \$ _____

Carpenters Individual Account Pension Plan

20 percent is *automatically* withheld for any payment or income of less than ten years. If you elect an income option of ten years or longer and want withholding, please check the space below.

- I want federal income tax withheld from my monthly benefit. If you check this option, please indicate the amount you want withheld each month.

Amount you want withheld each month: \$ _____

Participant's Name (please print): _____

Participant's Social Security Number: _____

Signature: _____ Date: _____