



WILLIAM PENN LIFE INSURANCE COMPANY OF NEW YORK

Attention: Retirement Services
3275 Bennett Creek Avenue
Frederick, MD 21704
(855) 914-9123

State Income Tax Withholding Election Form

Many states have a State Income Tax program and may consider either all or a portion of your retirement benefit payments to be taxable income. You may elect to have State Withholding taken from your benefit payments to assist you in meeting any potential tax liability that may result. Several states require you to have State Tax Withholding if you have elected to have Federal Tax Withholding. Please make your election below (select only one option). You may wish to consult with a tax advisor before making your election.

Personal Information			
First Name:	MI:	Last Name:	Social Security Number:
Street Address:			Benefit Type (check one): <input type="checkbox"/> Annuity <input type="checkbox"/> Lump Sum Payment
City:		State:	Zip Code:
Signature:			Date:

Non-Withholding States - Do not return this form	
Withholding for State income tax is either not applicable or is not permitted	
Alaska	New Hampshire
Florida	South Dakota
Hawaii	Tennessee
Nevada	Texas
Washington	Wyoming

Please base my State income tax withholding on:

Marital Status (check one): Single Married Married, but withhold at higher Single rate

Number of Exemptions: _____

Additional amount (if any) you want withheld: \$ _____

- or -

Please withhold a Flat amount of: \$ _____ from my payment(s)

- or -

Please withhold the following Percentage from my payment(s): _____ %

- or -

Please discontinue my State income tax withholding (check here)

This option is not available to residents of IA, MA, NE, OK, OR or VA if you have elected Federal Tax Withholding.

If you have any questions or need additional assistance, please do not hesitate to contact our Retirement Services Department via email at retirementservices@lgamerica.com or by calling us at (855) 914-9123, Monday through Friday, between 8 a.m. and 6 p.m. (ET).