# New York State Department of Taxation and Finance

**Annuitant's Request for Income Tax Withholding**

**New York State** • **New York City** • **Yonkers**

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<thead>
<tr>
<th>First name and middle initial</th>
<th>Last name</th>
<th>Your social security number</th>
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<tr>
<th>Permanent mailing address (number and street or rural route)</th>
<th>Apartment number</th>
<th>Annuity contract claim or identification number</th>
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<th>City, village, or post office</th>
<th>State</th>
<th>ZIP code</th>
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**Enter the whole dollar amount to be withheld from each annuity or pension payment:**

1. New York State income tax .......................................................... 1
2. New York City income tax (if a New York City resident) ...................... 2
3. Yonkers income tax surcharge (if a Yonkers resident) ....................... 3

I request voluntary income tax withholding from my annuity or pension payments as authorized by section 671(b) of the Tax Law.

Signature of annuitant: ____________________________

Date: ________________

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**IT-2104-P (8/05) (back)**

**Payee**

Who may file

If you receive an annuity or pension payment that must be included in your New York adjusted gross income, you may file this form to have New York State income tax (and, if a New York City or Yonkers resident, that city's personal income tax) withheld from each payment. However, the annuity or pension must be payable over a period longer than one year.

Where and how to file

File this form with the payer of your annuity or pension. Enter on the front the whole dollar amount(s) that you want withheld from each annuity or pension payment. However, each amount must be at least $5 per month and should not reduce the annuity or pension payment you receive to less than $10. Quarterly payments of estimated income tax may be made in addition to or instead of withholding; see Form IT-2105-1, Instructions for Form IT-2105, for more information.

If you need help completing this form, call toll-free 1 800 226-5929. From areas outside the U.S. and outside Canada, call (518) 485-6800.

Duration of withholding request

Your request for voluntary withholding will remain in effect until you terminate it.

How to terminate a withholding request

You may terminate your request for voluntary withholding by giving your payer a written termination notice.

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**Instructions**

**Statement of income tax withheld**

After the end of the year, your payer will give you federal Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc., showing the gross amount of annuity or pension payments and the total amount deducted and withheld as tax during the calendar year.

**Payer**

Keep this certificate with your records.

See the instructions for Form NYS-1, Return of Tax Withheld, and Form NYS-45, Quarterly Combined Withholding, Wage Reporting and Unemployment Insurance Return, for payment and reporting requirements for New York State, New York City, and Yonkers personal income taxes that you withheld from annuity or pension payments.

**Privacy notification**

The Commissioner of Taxation and Finance may collect and maintain personal information pursuant to the New York State Tax Law, including but not limited to, sections 170, 171-a, 167, 381, 392, 470, 629, 659, 720, 1106, 1142, and 1416 of that law, and may release disclosure of social security numbers pursuant to 42 USC 409(b)(6)(C).

This information will be used to determine and administer tax liabilities and, when authorized by law, for certain tax offset and exchange of tax information programs as well as for any other lawful purpose.

Information concerning quarterly wages paid to employees is provided to certain state agencies for purposes of fraud prevention, applicable to purposes, evaluation of the effectiveness of certain employment and training programs and other purposes allowed by law.

Failure to provide the required information may subject you to civil or criminal penalties, or both, under the Tax Law.

This information is maintained by the Director of Records Management and Data Entry, NYS Tax Department, 39 A Northampton Street, Albany NY 12237, telephone 1 800 226-5929. From areas outside the United States and outside Canada, call (518) 485-6800.