



Annuitant's Request for Income Tax Withholding

New York State • New York City • Yonkers

Print or type	First name and middle initial	Last name	Your social security number
	Permanent mailing address (<i>number and street or rural route</i>)		Apartment number
	City, village, or post office	State	ZIP code
Annuity contract claim or identification number			
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 (<i>if a New York City resident</i>)	2	
	3 Yonkers income tax surcharge (<i>if a Yonkers resident</i>)	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

IT-2104-P (8/09) (back)

Instructions

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-I, *Instructions for Form IT-2105*, for more information.

If you need help completing this form, call (518) 457-5181; in-state callers without free long distance call 1 800 225-5829.

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.

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 5-a, 171, 171-a, 287, 308, 429, 475, 505, 697, 1096, 1142, and 1415 of that Law; and may require disclosure of social security numbers pursuant to 42 USC 405(c)(2)(C)(i).

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, support enforcement, evaluation of the effectiveness of certain employment and training programs and other purposes authorized 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 Manager of Document Management, NYS Tax Department, W A Harriman Campus, Albany NY 12227; telephone (518) 457-5181.