**How to Fill Out Form W-4**

*Form W-4 indicates how much is withheld from your paychecks. Your filing status on your W-4 determines your income tax withholding. Withholding less from your paychecks may result in a balance due when you file your tax return.*

**Step 1**: This is the usual personal information that identifies you and indicates whether you plan to file your taxes as a single person, a married person, or a head of household on your tax return. If you claim to be single on your W-4, you can expect to have a higher income tax rate and thus have more money withheld from your paychecks.

**Step 2**: This part is for people whose circumstances indicate that they should withhold more or less than the standard amount. A spouse’s income, a second job, or freelance income are all factors that can be recorded here.

**Step 3**: This section is where you indicate the number of your children or other dependents. Claiming zero dependents will result in a higher income tax rate and thus have more money withheld from your paychecks.

**Step 4**: This optional section allows you to indicate other reasons to withhold more or less from your paycheck. Passive income from investments, for example, may increase your annual income and the amount of taxes that you owe. Itemizing deductions may lower the amount of taxes that you owe. These may be reasons to adjust your withholding on the W-4.

**Step 5**: Your signature.

You may also use the IRS Tax Withholding Estimator on the IRS.gov website to help you in this process. Follow this link here: <https://apps.irs.gov/app/tax-withholding-estimator>

If you are still experiencing issues with filling out your W-4, you may elect for us to complete your W-4 for you. The standard fee for W-4 completion is $30 per W-4. Please fill out the form provided by our office and return to us with the required information.

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 **W-4 Information Sheet**

*This information sheet helps you to provide the necessary information required for us to complete your Form W-4 on your behalf. Please fill this out and return to our office for us to review your tax situation to provide the most optimal way of filling out your W-4. Please note, there is a standard fee of $30 per W-4 requested.*

What is your filing status for the current year? \**if you are unsure, please refer to “What is My Filing Status?” tool on the IRS.gov website. This can be found below:*

<https://www.irs.gov/help/ita/what-is-my-filing-status>

Single [ ]  Head of Household [ ]  Married Filing Jointly [ ]
Married Filing Separately [ ]

How often will you be paid?

Weekly [ ]  Bi-Weekly [ ]  Semi-Monthly [ ]  Monthly [ ]

|  |
| --- |
|   |

 Please list your number of dependents *under* the age of 17:

|  |
| --- |
|   |

Please list your number of dependents *over* the age of 18:

|  |
| --- |
|   |

List amount contributed to 401k or Pre-Tax Retirement Plan *per pay period*:

|  |
| --- |
|   |

List amount of Pre-Tax Health Insurance *per pay period*:

|  |
| --- |
|   |

List amount of income from other sources or jobs *per pay period*:

|  |
| --- |
|   |

List amount of income from your spouses’ job or other sources *per pay period*:

Please indicate your preferences below:

[ ]  I would prefer a refund.

[ ]  I would prefer to break-even.

[ ]  I would prefer to owe money.