Quick Guide to the new 2020 Form W-4 from IRS.gov

Steps 2, 3 and 4 are 

**OPTIONAL.** Use Step 2 if there are multiple jobs or both spouses work. Use steps 3 and/or 4 if you want to adjust withholding so that it closely matches your actual tax liability.

Line 4(b) should report deductions **OVER** the standard deduction amount. See the instructions.

**Required**

Form W-4

Employee’s Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.

Your withholding is subject to review by the IRS.

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### Form W-4

**Department of the Treasury Internal Revenue Service**

**Step 1:** Enter Personal Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name and middle initial</td>
<td>Full name</td>
</tr>
<tr>
<td>Social security number</td>
<td>Social security number</td>
</tr>
</tbody>
</table>

**Step 2:** Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following:

1. Use the estimator at www.irs.gov/W4App for most accurate withholding; or
2. Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
3. If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

**CAUTION:** If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).

Complete Steps 3 through 4 ONLY if they apply to you. To see if you are exempt from withholding or if you have concerns about your privacy, see page 2. Everyone must complete Step 5. See instructions on page 2.

**Step 3:** Claim Dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

- Multiply the number of qualifying children under age 17 by $2,000
- Add the amounts above and enter the total here

**Step 4:** Other Adjustments

(a) Other income. If you want tax withheld for other income you expect this year that won’t have withholding, enter the amount of other income here. You should not include income from any jobs.

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here.

(c) Extra withholding. Enter any additional tax you want withheld each pay period.

**Step 5:** Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

**Employee’s signature**

**Date**

**Employers Only**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer’s name and address</td>
<td>Employer’s name and address</td>
</tr>
<tr>
<td>First date of employment</td>
<td>First date of employment</td>
</tr>
<tr>
<td>Employer identification number (EIN)</td>
<td>Employer identification number (EIN)</td>
</tr>
</tbody>
</table>

For Privacy Act and Paperwork Reduction Act Notice, see page 3.

Cat. No. 10220Q | Form W-4 (2020)

Note: If you use this box, each spouse should check the box on their Form W-4. But ONLY one spouse should complete lines 3 through 4(b).

Lines 3, 4(a) and 4(b) are **FULL-YEAR** amounts. Line 4(c) is a **PER-PAYROLL** amount.

For additional help

Use the IRS online Withholding Estimator at apps.irs.gov/app/tax-withholding-estimator

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