

Example of a completed form W-4

This is an example to guide you in filling out your W-4 tax form.

If you are not sure on how to fill your W-4, see the official IRS website at www.irs.gov. You may also consider consulting a tax advisor. Amazon cannot advise you on what values to submit on your W-4.

Example: Mary Smith's W-4

Mary Smith starts a new job in 2020, is **married**, and files a **joint tax return with her spouse**.

In completing her 2020 Form W-4, Mary claims:

- A filing status of Married filing jointly (**Step 1**)
- Marks the checkbox in **Step 2(c)**
- Completes **Steps 3, 4(a), 4(b), and 4(c)***
- Signs the form (**Step 5**)

See each step in detail in the next pages.

*** Please note:** Mary completes steps 3, 4a and 4b because she is the higher earning spouse in her family. Her spouse will not complete these steps. If this was not the case, she wouldn't complete steps 3, 4a and 4b.

Form W-4		Employee's Withholding Certificate	
Department of the Treasury Internal Revenue Service		OMB No. 1545-0074 2020	
<p>► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ► Give Form W-4 to your employer. ► Your withholding is subject to review by the IRS.</p>			
Step 1: Enter Personal Information	(a) First name and middle initial MARY	Last name SMITH	(b) Social security number 123-45-6789
	► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .		
<p>Address xyz MAIN STREET City or town, state, and ZIP code SEATTLE, WA 98122</p>			
<p>(c) <input type="checkbox"/> Single or Married filing separately <input checked="" type="checkbox"/> Married filing jointly (or Qualifying widow(er)) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)</p>			
<p>Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.</p>			
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. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) 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 ► <input checked="" type="checkbox"/>		
<p>TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.</p>			
<p>Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)</p>			
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 ► \$ 6,000 Multiply the number of other dependents by \$500 ► \$ 500 Add the amounts above and enter the total here 3 \$ 6,500		
Step 4 (optional): Other Adjustments	<p>(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income 4(a) \$ 26,000</p> <p>(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 4(b) \$ 2600</p> <p>(c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) \$ 100</p>		
Step 5: Sign Here	<p>Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.</p> <p>Mary Smith ► 07/29/2020 Employee's signature (This form is not valid unless you sign it.) Date</p>		
Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)
<p>For Privacy Act and Paperwork Reduction Act Notice, see page 3.</p>			
<p>Cat. No. 10220Q Form W-4 (2020)</p>			

Example: Mary Smith's W-4 – Step 1

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.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

OMB No. 1545-0074

2020

Step 1: Enter Personal Information	(a) First name and middle initial MARY	Last name SMITH	(b) Social security number 123-45-6789
	Address xyz MAIN STREET	► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .	
	City or town, state, and ZIP code SEATTLE, WA 98122		
	(c) <input type="checkbox"/> Single or Married filing separately <input checked="" type="checkbox"/> Married filing jointly (or Qualifying widow(er)) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2: Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse

Mary enters her first, last name, her full address...

...her social security number...

...and checks the box "Married filing jointly"

Example: Mary Smith's W-4 – Step 2

<input type="checkbox"/>	Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)
Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.	
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. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) 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. ► <input checked="" type="checkbox"/>
TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.	
Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)	
Step 3: Claim	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 ► \$ 6,000

Following the indications highlighted, she checks the box on option (c)

Example: Mary Smith's W-4 – Step 3

Mary enters step 3 in this W-4 because she is the higher earning spouse in her family. Her spouse will not complete step 3.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

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 ► \$ <u>6,000</u> Multiply the number of other dependents by \$500 . . . ► \$ <u>500</u> Add the amounts above and enter the total here <small>(or other income that you expect if you want tax withheld for other income you expect)</small>
Step 4	3 \$ <u>6,500</u>

Mary claims the child tax credit for 3 children under age 17 (\$6,000)...

...and the other dependents tax credit for 1 child age 19 who attends college (\$500).

...and enters the total here (\$6,500).

Remind:

You can also include **other tax credits** in this step, such as **education tax credits** and the **foreign tax credit**. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3.

Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Example: Mary Smith's W-4 – Step 4

Mary enters steps 4 (a) and (b) in this W-4 because she is the higher earning spouse in her family. Her spouse will not complete these steps.

Mary reports \$26,000 in other income that is not subject to withholding...

[Note: this is an **annual amount**, and increases the taxable amount]

Add the amounts above and enter the total here		3 \$ 6,500
Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income	4(a) \$ 26,000
	(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	4(b) \$ 2600
	(c) Extra withholding. Enter any additional tax you want withheld each pay period	4(c) \$ 100

...\$2,600 in itemized deductions above the standard deduction...

[Note: this is an **annual amount**, and increases the taxable amount]

...and asks for additional tax withholding of \$100 per pay period.

[Note: this amount will be withheld **each pay period** (for example, every week if you are paid weekly)]

Example: Mary Smith's W-4 – Step 5

...finally Mary signs the form and enters the date.

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.		
		07/29/2020	
	Employee's signature (This form is not valid unless you sign it.)	Date	
Employer:	Employer's name and address	First date of	Employer identification

Note:

If you fill out the W-4 online, your signature is replaced by a guided procedure of **on-line acknowledgement**.

End of the guide

If you have a question relating to your W-4, contact us via one of the following routes:

- ERC Services: 1-888-892-7180 (toll free)
- Contact your onsite HR associate or your HRBP
- Create a ticket at <https://t.corp.amazon.com> (Category: Payroll, Type: US Payroll, Item: W4 and state tax forms)

If you are not sure on how to fill your W-4, see the official IRS website at www.irs.gov. You may also consider consulting a tax advisor. Amazon cannot advise you on what values to submit on your W-4.