



LAST NAME (Please Print)	First	M.I.	Social Security #
Home Phone	Work	Cell/Pager	*Indicate Primary
E-mail Address			Strongest Areas of Legal Experience
Street Address			Apt. #
City			State
Zip Code			
Types of Position interested in:			
1.			
2.			
3.			
To avoid duplicating your job search, please list companies you have contacted on your own or through some other source:			

**Additional areas of interest**

<input type="checkbox"/> Accountant	<input type="checkbox"/> Admin. Asst.	<input type="checkbox"/> Attorney	<input type="checkbox"/> Clerical	<input type="checkbox"/> Data Entry	<input type="checkbox"/> Docketing	<input type="checkbox"/> Exec. Asst.
<input type="checkbox"/> IT/Help Desk	<input type="checkbox"/> HR / HRA	<input type="checkbox"/> JD	<input type="checkbox"/> Law Student	<input type="checkbox"/> Legal Sec.	<input type="checkbox"/> Library	<input type="checkbox"/> Library Asst.
<input type="checkbox"/> LLM	<input type="checkbox"/> Marketing	<input type="checkbox"/> Office Services	<input type="checkbox"/> Paralegal-Entry	<input type="checkbox"/> Paralegal-Mid	<input type="checkbox"/> Paralegal-Senior	<input type="checkbox"/> Project Asst.
<input type="checkbox"/> Receptionist	<input type="checkbox"/> Records	<input type="checkbox"/> Recruiter	<input type="checkbox"/> Scanner	<input type="checkbox"/> Secretary	<input type="checkbox"/> Secy-Floater	<input type="checkbox"/> Word Proc.

Areas of law you prefer or are interested in gaining experience in:	
Areas of law you do not like?	
Particular firms you are interested in?	
Particular firms you are not interested in working for?	
Firm size you prefer?	How did you hear about us?

**Please check areas of law experience:**

<input type="checkbox"/> Med. Malpractice	<input type="checkbox"/> Administrative	<input type="checkbox"/> Litigation	<input type="checkbox"/> Patent
<input type="checkbox"/> Intellectual Prop.	<input type="checkbox"/> Immigration	<input type="checkbox"/> Real Estate	<input type="checkbox"/> Energy
<input type="checkbox"/> Labor/Employment	<input type="checkbox"/> Bankruptcy	<input type="checkbox"/> Construction	<input type="checkbox"/> Banking
<input type="checkbox"/> Telecommunication	<input type="checkbox"/> Mergers/Acq	<input type="checkbox"/> Trademark	<input type="checkbox"/> Tax
<input type="checkbox"/> Corporate	<input type="checkbox"/> Estates/Trusts	<input type="checkbox"/> Food & Drug	<input type="checkbox"/> Health
<input type="checkbox"/> Personal Injury	<input type="checkbox"/> Gov't Contracts	<input type="checkbox"/> Antitrust	<input type="checkbox"/> Environmental
<input type="checkbox"/> Other area of law			

**Select your 5 greatest strengths:**

<input type="checkbox"/> Ability to prioritize	<input type="checkbox"/> Self Motivated	<input type="checkbox"/> Overtime	<input type="checkbox"/> Phones	<input type="checkbox"/> Production level	<input type="checkbox"/> Scheduling
<input type="checkbox"/> Client Interaction	<input type="checkbox"/> Team Player	<input type="checkbox"/> Computer	<input type="checkbox"/> Typing	<input type="checkbox"/> Sense of urgency	<input type="checkbox"/> Spelling
<input type="checkbox"/> Production level	<input type="checkbox"/> Organization	<input type="checkbox"/> Flexibility	<input type="checkbox"/> Legal	<input type="checkbox"/> Quality of Work	<input type="checkbox"/> Grammar

Preferred Hours	<input type="checkbox"/> Part Time	Willing to go to N. Va?	Georgetown?	DC?	<input type="checkbox"/> Metro (Public trans. only)
<input type="checkbox"/> 8:30-5:00	<input type="checkbox"/> 9:00-5:30	<input type="checkbox"/> 9:30-6:00	<input type="checkbox"/> Evenings/Weekends	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
On a scale of 1-10 (1 poor, 10-excellent)			Languages/Skill Level (Read-R, Write-W, Speak-S)		
How well do you work for demanding people? _____			Shorthand Dictaphone		
How are your organizational skills? _____			Your punctuality? _____		
R	W	S	R	W	S
			<input type="checkbox"/> Yes <input type="checkbox"/> No		
			<input type="checkbox"/> Yes <input type="checkbox"/> No		

Please check the following areas in which you have experience and indicate how long you have worked in them

<input type="checkbox"/> Blue Booking Yrs _____	<input type="checkbox"/> Cite Checking Yrs _____	<input type="checkbox"/> Sheppardizing Yrs _____	<input type="checkbox"/> Bates Stamping Yrs _____
<input type="checkbox"/> Discovery Yrs _____	<input type="checkbox"/> Document Coding Yrs _____	<input type="checkbox"/> Doc. Production Yrs _____	<input type="checkbox"/> Privilege Review Yrs _____
<input type="checkbox"/> Privilege Log Yrs _____	<input type="checkbox"/> Trial Preparation Yrs _____	<input type="checkbox"/> Trial Experience Yrs _____	<input type="checkbox"/> Shorthand Yrs _____
<input type="checkbox"/> Foreign Filing Yrs _____	<input type="checkbox"/> Docketing Yrs _____	<input type="checkbox"/> Pleadings Index Yrs _____	<input type="checkbox"/> Dictaphone Yrs _____

Please check experience in the following software programs and how long you have worked with them:

<input type="checkbox"/> MS Word Yrs _____	<input type="checkbox"/> PowerPoint Yrs _____	<input type="checkbox"/> Excel Yrs _____	<input type="checkbox"/> Access Yrs _____	<input type="checkbox"/> WordPerfect Yrs _____
<input type="checkbox"/> Westlaw Yrs _____	<input type="checkbox"/> Lexis-Nexis Yrs _____	<input type="checkbox"/> Legal Key Yrs _____	<input type="checkbox"/> Styles Yrs _____	<input type="checkbox"/> Concordance Yrs _____
<input type="checkbox"/> iManage Yrs _____	<input type="checkbox"/> FastNotes Yrs _____	<input type="checkbox"/> Compare Yrs _____	<input type="checkbox"/> PC Docs Yrs _____	<input type="checkbox"/> SoftSolutions Yrs _____
<input type="checkbox"/> Deltaview Yrs _____	<input type="checkbox"/> Carpe Diem Yrs _____	<input type="checkbox"/> DTE Yrs _____	<input type="checkbox"/> Summation Yrs _____	<input type="checkbox"/> Elite Yrs _____
<input type="checkbox"/> CMS Yrs _____	<input type="checkbox"/> People Soft Yrs _____	<input type="checkbox"/> ADP Yrs _____	<input type="checkbox"/> Ceridian Yrs _____	<input type="checkbox"/> Timeslips Yrs _____

Please list all other software programs and special skills or training:

### Previous Employment

#### Present/Last Position

Dates Employed		Position	Company/Firm Name
From (Mo./Yr.)	To		
Ending Salary	Starting Salary	Supervisor	Address
Overtime Salary	Next Raise	Supervisor's Position	Phone Number
Reason for Leaving	Number of People in Company / Number Supervised		Type of Business

#### Previous Position

Dates Employed		Position	Company/Firm Name
From (Mo./Yr.)	To		
Ending Salary	Starting Salary	Supervisor	Address
Overtime Salary	Next Raise	Supervisor's Position	Phone Number
Reason for Leaving	Number of People in Company / Number Supervised		Type of Business

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Dates Employed		Position	Company/Firm Name
From (Mo./Yr.)	To		
Ending Salary	Starting Salary	Supervisor	Address
Overtime Salary	Next Raise	Supervisor's Position	Phone Number
Reason for Leaving	Number of People in Company / Number Supervised		Type of Business

Have you ever been convicted of a felony offense?  Yes  No (If yes, explain)

**Please read carefully**

It is our policy to make referrals of employment candidates to employers based on merit only. Our selection process is not influenced by race, sex, religion, color, age, or national origin. I agree to the policy of conducting background reference check and understand that under the Fair Credit Reporting Act I have the right to a disclosure of the nature and substance of any background investigation.

May we contact your current employer?  
 Yes  No

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Emergency Contact Information:  
 Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_



## ATTORNEY BARRED CERTIFICATION

### Attorney Barred Certification

Name: \_\_\_\_\_

Date: \_\_\_\_\_

State Barred: \_\_\_\_\_ Bar #: \_\_\_\_\_ Active   
Inactive

State Barred: \_\_\_\_\_ Bar #: \_\_\_\_\_ Active   
Inactive

State Barred: \_\_\_\_\_ Bar #: \_\_\_\_\_ Active   
Inactive



## CONFIDENTIALITY AGREEMENT

I understand that as a temporary employee of Palmer Legal Staffing, I shall be working on assignments at various law firms, corporate legal departments and other companies where I will be privy to confidential and privileged documents and information. I understand that such documents and information are subject to attorney-client work product restrictions upon disclosure to others and are highly confidential in nature.

I agree not to disclose any documents and information that I see or hear while working on an assignment for a client firm to anyone outside of the principals and employees of that firm. I further agree not to discuss this information with employees of the firm unless necessary to my job performance or I am instructed to do so. I agree that I shall not use any information gained while on assignment for my personal benefit or for the benefit of others.

I declare that I do not have any business interest or proprietary interest with any person or in any business which would create a conflict of interest with respect to the work I shall perform for the law firm or client of Palmer Legal Staffing where I am to be assigned. I further declare that I shall not accept any future assignment with any law firm or client of Palmer Legal Staffing, if my work for the firm or client would create a conflict of interest because of any business interest I shall then have, or any proprietary interest I shall then have with any person or in any business.

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Signature

---

Witness Signature

---

Name

---

Witness Name

---

Title

---

Date

---

Date



**To Be Completed by Applicant-Please Fill Out the Top Portion of the Request Only.**

Reference Name & Title \_\_\_\_\_

Company Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Phone Number/ Fax Number \_\_\_\_\_

Email (preferred) \_\_\_\_\_

I, \_\_\_\_\_ (print name),  
authorize you to furnish Palmer Legal Staffing with my  
employment record and any additional information about  
my job history and performance that may enable Palmer  
Legal Staffing to determine my employment qualifications.  
I hereby release both you and Palmer Legal Staffing from  
any and all liability for any damage that results from the  
disclosure of this information.

\_\_\_\_\_  
Applicant Signature

**To Be Completed by Employer**

Please mail or fax (202.464.1002) the following information about the above named applicant who is currently applying to work with Palmer Legal Staffing. All information provided by you will be completely confidential. We thank you in advance for the information.

Employed from \_\_\_\_\_ to \_\_\_\_\_ Job Title \_\_\_\_\_

Please check the appropriate skill level of the applicant in the following categories:

	Excellent	Good	Satisfactory	Poor		Excellent	Good	Satisfactory	Poor
Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Office Etiquette	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reliability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organizational Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attitude	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to Follow Directions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Player	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to Work on Own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Speed/Efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quality of Work Produced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Eligible for Re-hire	Yes <input type="checkbox"/>		No <input type="checkbox"/>	

We appreciate any comments you would like to add:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

**Palmer Legal Staffing/Palmer Staffing Services** is a full service staffing agency providing temp, temp to hire and direct hire placements for all general office support staff, management and more.

Yes, I would like more information about Palmer Legal Staffing.



**To Be Completed by Applicant-Please Fill Out the Top Portion of the Request Only.**

\_\_\_\_\_  
Reference Name & Title

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Phone Number/ Fax Number

\_\_\_\_\_  
Email (preferred)

I, \_\_\_\_\_ (print name),  
authorize you to furnish Palmer Legal Staffing with my  
employment record and any additional information about  
my job history and performance that may enable Palmer  
Legal Staffing to determine my employment qualifications.  
I hereby release both you and Palmer Legal Staffing from  
any and all liability for any damage that results from the  
disclosure of this information.

\_\_\_\_\_  
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Client Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quality of Work Produced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Eligible for Re-hire	Yes <input type="checkbox"/>		No <input type="checkbox"/>	

We appreciate any comments you would like to add:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

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Reference Name & Title \_\_\_\_\_

Company Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Phone Number/ Fax Number \_\_\_\_\_

Email (preferred) \_\_\_\_\_

I, \_\_\_\_\_ (print name),  
authorize you to furnish Palmer Legal Staffing with my  
employment record and any additional information about  
my job history and performance that may enable Palmer  
Legal Staffing to determine my employment qualifications.  
I hereby release both you and Palmer Legal Staffing from  
any and all liability for any damage that results from the  
disclosure of this information.

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Attitude	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to Follow Directions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Player	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability to Work on Own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Speed/Efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Quality of Work Produced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Eligible for Re-hire	Yes <input type="checkbox"/>		No <input type="checkbox"/>	

We appreciate any comments you would like to add:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

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Yes, I would like more information about Palmer Legal Staffing.



**TEMPORARY  
ASSIGNMENT  
QUESTIONNAIRE**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

In order to avoid duplication, we request a list of the DC Metro area law firms and companies (not the employment agencies that you contracted through) where you have temped during the past 2 years.

**Company Name**

**Date**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_



## TEMPORARY POLICY SHEET

**Welcome to Palmer Legal Staffing.** We are glad you have chosen to register with us! The right attitude is critical to having a successful assignment and will carry over into a successful career. Please read through our policies and sign at the end, any questions please ask your recruiter.

**Time Sheets** - All temporaries are employees of Palmer Legal Staffing. (PLS). Please confirm that you have filled out the proper Federal, State or District tax forms. You **MUST** use a PLS time sheet for every assignment. Please fill it out completely and properly. If you do not clearly check whether or not you want your check mailed home or to the office, it will automatically be mailed to your home address that we have on file. **Fax your time sheet** no later than Monday Noon for work completed the previous week **to (703) 904-1891**. When totaling your hours for the day, round to the nearest quarter hour (.25, .5 or .75). We do not pay for lunch.

**Pay Checks** – Paychecks are processed and mailed out on Mondays, provided the above requirements are met. (Please allow two to three days for delivery by the U.S. Postal Service.) If you checked the box on the timesheet to have your paycheck to be mailed to our office, it will be available on Wednesdays at noon. During the weeks in which holiday falls, expect at least a one-day delay in receiving your paycheck. If your time sheet is faxed in late or missing information, your check will be processed within 24 hours from the time we receive a completed time sheet.

**Punctuality** - It is very important to arrive on time to your assignment. Plan to arrive 10-15 minutes early on the first day of a new assignment. If the weather forecast calls for rain or snow, please allow for delays and leave your home early.

**Sickness or Late Arrival** - It is critical to notify PLS the moment there is any type of problem that will delay or prevent you from going to your assignment immediately. You may contact PLS at anytime of the day or night. WE ARE ACCESSIBLE TO YOU AND THE CLIENT 24-HOURS. Normal business hours are as follows: Monday through Friday, 8:30 AM-5:30 PM with the exception of some holidays. When calling after business hours, please leave a detailed voice-mail message including a telephone number where you can be reached. If PLS personnel are not available, leave a message with complete details (running 15 minutes late, out all day but in tomorrow, etc.) and then call the assignment directly. ALWAYS CALL PLS FIRST. There may be instances where PLS may require appropriate documentation verifying an emergency for unscheduled leave.

**No Call/No Show Policy** – If for any reason you are unable to show for work, it is important for you to contact PLS immediately. If you do not show for work and do not call PLS informing us of your absence, it will be considered abandonment of your job. We will not be able to work with you in the future except for situations where you may be able to provide proof that you were unable to contact PLS.

**Conflicts Policy** – If you determine you have worked on a matter related to your current temporary assignment in any prior temporary or permanent position, please alert the person supervising you immediately.

**Overtime** – Overtime pay begins at time-and-one-half after forty hours in one week. Prior to working any overtime, it must be approved by your supervisor at the law firm or corporation. All overtime hours that have not been authorized by the client will not be paid.

**Lunch/Hours of Assignment** – When you are contacted for an assignment by PLS, you will be given specific information including the address of the firm, a contact person and the exact hours and days you will be working. Please remember that you are required to take a one-hour lunch/break each day of the assignment unless you have been granted special authorization by the contact at the firm. Any changes to your scheduled hours must also be pre-authorized by your immediate supervisor or your consultant at PLS.

**Ending Assignment Early** – Even though your assignment is expected to last a certain amount of time, the client may choose to end it earlier than expected. There may also be other circumstances where a client will close their offices due to uncontrollable situations, which include but are not limited to inclement weather, bomb threats or special functions. PLS will not be responsible to pay you for any portion of the original assignment that you do not work. As a temporary employee, you will only be paid for actual hours worked.

**Communication** - With your assignment is to be conducted through PLS. Do not communicate with your assignment directly unless cleared with a PLS personnel if it is regarding requesting time off, scheduling job interviews other than on your lunch break, personal & work related problems, questioning when an assignment will end or why an assignment is ending, chance of permanent hiring, etc.

**Status** - When contacted by PLS regarding your availability for assignments, **please call us back!** If we are not in, please leave a message with appropriate information (On an assignment for another agency until such date, I am available, Please call me, or No I am not available until such date). **This is very important** and will help to keep you working continually.

**Time Off (while on an assignment)** – Once you have accepted a temporary assignment from Palmer Legal Staffing, we expect you to fulfill your commitment. If you cannot honor the length of the commitment stated to you when the assignment was presented, please do not accept it. If you must take an entire day off, this should be arranged at least one week in advance. Interviews, doctor appointments etc. should be arranged at least 48 hours in advance if you require it to be scheduled at anytime other than on your lunch break.

**Personal Calls** - You should not make personal calls from your assignment, unless it is an emergency. If any, personal calls should only be made during lunch and breaks. **No long distance or collect calls are allowed.** No pagers or cellular phones are to be used during working hours at your assignment.

**Dress** - Appropriate business attire is mandatory at all times unless instructed otherwise by PLS or your assignment supervisor. Appropriate dress means tie and jacket for men, and dress, skirt or suit for women. Business attire **DOES NOT** include sneakers, blue jeans, leggings, flip flop shoes, shorts, skorts, Capri pants, logo t-shirts or athletic wear. Hats are inappropriate to be worn indoors. Please use good judgment in choosing your attire.

**Computer Use** - Never insert a personal disk into a client's computer. Do not use the Internet for personal reasons while on an assignment and never rearrange the layout (icons, short-cuts and files) of someone else's computer desktop.

**Change of Address** - If you have moved, you must contact PLS with your new address. We will not stop payment on paychecks that have been sent to your old address when you failed to inform us of your new address. If you move and do not update us with new address information, your W-2 form will be sent to the last address we have listed in our office.

**Completed Assignments** - After you have completed or left an assignment, there must be no further contact with the client or its employees. No further contact includes, but is not limited to phone calls, e-mail messages, mail, fax or visitation. We ask that you do not return to the firm after an assignment has ended. Should you have any questions or follow-up issues with the firm, your consultant at PLS will contact the client.

**Miscellaneous** - Under no circumstances should a temporary on assignment ask anyone at the firm for money. Do not decorate desks with personal items, i.e., pictures, radios, mirrors, heaters, etc. PLS is not responsible for personal items that cannot be retrieved after an assignment ends.

If PLS is unable to bill a client due to the performance of a temporary or breaking of the above policies, PLS may elect to pay the temporary minimum wage.

Palmer Legal Staffing is committed to providing equal opportunity employment. We do not discriminate in any aspect of employment on the basis of race, color, national origin sex, age, marital status, sexual orientation, family responsibility, disability or any other improper criterion. Palmer Legal Staffing will not tolerate unlawful harassment of any kind. Concerns about sexual harassment or equal employment opportunity should be raised with your consultant or anyone in management, at PLS. Any complaints will be investigated promptly. Confidentiality will be maintained to the extent practical and appropriate under the circumstances. PLS will not retaliate, nor will it tolerate any attempt at retaliation, against person who raised employment discrimination or harassment concerns in good faith. Any PLS employee found to have violated the company's policy would be subject to discipline up to and including termination.

I have read and understand the information listed above \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Year **D-4 Employee Withholding Allowance Certificate**

Your first name	M.I.	Last name
Home address (number and street)		Apartment number
		Social security number
City	State	Zip code +4
1 Tax filing status <i>Fill in only one:</i> <input type="radio"/> Single <input type="radio"/> Married/domestic partners filing jointly <input type="radio"/> Married filing separately <input type="radio"/> Head of household <input type="radio"/> Married/domestic partners filing separately on same return		
2 Total number of withholding allowances from worksheet below <input style="width: 20px;" type="text"/>		
3 Additional amount, if any, you want withheld from each paycheck           \$ <input style="width: 100px;" type="text"/>		
4 If claiming exemption from withholding, read below and, if qualified, write "EXEMPT" in this box. I am exempt because: last year I did not owe any DC income tax and had a right to a full refund of all DC income tax withheld from me; and this year I do not expect to owe any DC income tax and expect a full refund of all DC income tax withheld from me; and I qualify for exempt status on federal Form W-4. If claiming withholding exemption, are you a full-time student.           Yes <input type="radio"/> No <input type="radio"/>		
<b>Signature</b> Under penalties of law, I declare that I have completed this certificate and, to the best of my knowledge, it is correct.		
Employee's signature	Date	
<input style="width: 300px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/>	

*Employer* Keep this certificate with your records. If 10 or more exemptions are claimed or if you suspect this certificate contains false information please send a copy to: Office of Tax and Revenue, 941 North Capitol St., NE, Washington, DC 20002-4259 Attn: Compliance Administration

# Detach and give the top portion to your employer. Keep the bottom portion for your records.

**D-4 Employee Withholding Allowance Worksheet**

<b>Section A Number of withholding allowances</b>		
a Enter 1 for yourself and	a	<input style="width: 100%;" type="text"/>
b Enter 1 if you are filing as a head of household and	b	<input style="width: 100%;" type="text"/>
c Enter 1 if you are 65 or over and	c	<input style="width: 100%;" type="text"/>
d Enter 1 if you are blind	d	<input style="width: 100%;" type="text"/>
e Enter number of dependents	e	<input style="width: 100%;" type="text"/>
f Enter 1 for your spouse/registered domestic partner if filing jointly	f	<input style="width: 100%;" type="text"/>
g Enter 1 if married/registered domestic partners filing jointly and your spouse/registered domestic partner is 65 or over and	g	<input style="width: 100%;" type="text"/>
h Enter 1 if married/registered domestic partners filing jointly and your spouse/registered domestic partner is blind	h	<input style="width: 100%;" type="text"/>
i Number of allowances Add Lines a through h and enter on Line 2 of the certificate. If you want to claim additional withholding allowances, complete section B below.	i	<input style="width: 100%;" type="text"/>
<b>Section B Additional withholding allowances</b>		
j Enter estimate of your itemized deductions	j	<input style="width: 100%;" type="text"/>
k Enter \$2,000 if married/registered domestic partners filing separately; all others enter \$4,000	k	<input style="width: 100%;" type="text"/>
l Subtract k from j	l	<input style="width: 100%;" type="text"/>
m Multiply \$1,675 by the number of allowances on Line i	m	<input style="width: 100%;" type="text"/>
n Divide l by m. Round to the nearest whole number.	n	<input style="width: 100%;" type="text"/>
o Add Lines n and i and enter on Line 2 above.	o	<input style="width: 100%;" type="text"/>

# Detach and give the top portion to your employer. Keep the bottom portion for your records.

---

**Who must file a Form D-4?**

Every new employee who resides in DC and is required to have DC taxes withheld, must fill out Form D-4 and file it with his/her employer.

If you are not liable for DC taxes because you are a nonresident you must file Form D-4A. Certificate of Nonresidence in the District of Columbia, with your employer.

**When should you file?**

File Form D-4 whenever you start new employment. Once filed with your employer, it will remain in effect until you file an amended certificate. You may file a new withholding allowance certificate any time the number of withholding allowances you are entitled to increases. You must file a new certificate within 10 days if the number of withholding allowances you claimed decreases.

**How many withholding allowances should you claim?**

Use the worksheet on the front of this form to figure the number of withholding allowances you should claim. If you want less money withheld from your paycheck, you may claim additional allowances by completing Section B of the worksheet, Lines j through o. However, if you claim too many allowances, you may owe additional taxes at the end of the year.

**Should I have an additional amount deducted from my paycheck?**

In some instances, even if you claim zero withholding allowances, you may not have enough tax withheld. You may, upon agreement with your employer, have more tax withheld by entering on Line 3, a dollar amount of your choosing.

**What to file**

After completing Form D-4, detach the top portion and file it with your employer. Keep the bottom portion for your records.

# FORM VA-4

## COMMONWEALTH OF VIRGINIA DEPARTMENT OF TAXATION PERSONAL EXEMPTION WORKSHEET

(See back for instructions)

1. If you wish to claim yourself, write "1" .....
2. If you are married and your spouse is not claimed on his or her own certificate, write "1" .....
3. Write the number of dependents you will be allowed to claim on your income tax return (do not include your spouse).....
4. Subtotal Personal Exemptions (add lines 1 through 3).....
5. Exemptions for age
  - (a) If you will be 65 or older on January 1, write "1" .....
  - (b) If you claimed an exemption on line 2 and your spouse will be 65 or older on January 1, write "1" .....
6. Exemptions for blindness
  - (a) If you are legally blind, write "1" .....
  - (b) If you claimed an exemption on line 2 and your spouse is legally blind, write "1" .....
7. Subtotal exemptions for age and blindness (add lines 5 through 6) .....
8. Total of Exemptions - add line 4 and line 7 .....

-----  
Detach here and give the certificate to your employer. Keep the top portion for your records

### FORM VA-4 EMPLOYEE'S VIRGINIA INCOME TAX WITHHOLDING EXEMPTION CERTIFICATE

Your Social Security Number	Name		
Street Address			
City	State	Zip Code	

#### COMPLETE THE APPLICABLE LINES BELOW

1. If subject to withholding, enter the number of exemptions claimed on:
  - (a) Subtotal of Personal Exemptions - line 4 of the Personal Exemption Worksheet.....
  - (b) Subtotal of Exemptions for Age and Blindness line 7 of the Personal Exemption Worksheet .....
  - (c) Total Exemptions - line 8 of the Personal Exemption Worksheet.....
2. Enter the amount of additional withholding requested (see instructions).....
3. I certify that I am not subject to Virginia withholding. I meet the conditions set forth in the instructions (check here) .....

2601064 Rev. 11/07

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

EMPLOYER: Keep exemption certificates with your records. If you believe the employee has claimed too many exemptions, notify the Department of Taxation, P.O. Box 1115, Richmond, Virginia 23218-1115, telephone (804) 367-8037.

## FORM VA-4 INSTRUCTIONS

Use this form to notify your employer whether you are subject to Virginia income tax withholding and how many exemptions you are allowed to claim. You must file this form with your employer when your employment begins. If you do not file this form, your employer must withhold Virginia income tax as if you had no exemptions.

### PERSONAL EXEMPTION WORKSHEET

**You may not claim more personal exemptions on form VA-4 than you are allowed to claim on your income tax return unless you have received written permission to do so from the Department of Taxation.**

Line 1. You may claim an exemption for yourself.

Line 2. You may claim an exemption for your spouse if he or she is not already claimed on his or her own certificate.

Line 3. Enter the number of dependents you are allowed to claim on your income tax return.

**NOTE:** A spouse is not a dependent.

Line 5. If you will be age 65 or over by January 1, you may claim one exemption on Line 5(a). If you claim an exemption for your spouse on Line 2, and your spouse will also be age 65 or over by January 1, you may claim an additional exemption on Line 5(b).

Line 6. If you are legally blind, you may claim an exemption on Line 6(a). If you claimed an exemption for your spouse on Line 2, and your spouse is legally blind, you may claim an exemption on Line 6(b).

## FORM VA-4

Be sure to enter your social security number, name and address in the spaces provided.

Line 1. If you are subject to withholding, enter the number of exemptions from:

- (a) Subtotal of Personal Exemptions - line 4 of the Personal Exemption Worksheet
- (b) Subtotal of Exemptions for Age and Blindness - line 7 of the Personal Exemption Worksheet
- (c) Total Exemptions - line 8 of the Personal Exemption Worksheet

Line 2. If you wish to have additional tax withheld, and your employer has agreed to do so, enter the amount of additional tax on this line.

Line 3. If you are not subject to Virginia withholding, check the box on this line. You are not subject to withholding if you meet any one of the conditions listed below. Form VA-4 must be filed with your employer for each calendar year for which you claim exemption from Virginia withholding.

- (a) You had no liability for Virginia income tax last year and you do not expect to have any liability for this year.
- (b) You expect your Virginia adjusted gross income to be less than the amount shown below for your filing status:

	Taxable Years 2005, 2006 and 2007	Taxable Years 2008 and 2009	Taxable Years 2010 and 2011	Taxable Years 2012 and Beyond
Single	\$7,000	\$11,250	\$11,650	\$11,950
Married	\$14,000	\$22,500	\$23,300	\$23,900
Married, filing a separate return	\$7,000	\$11,250	\$11,650	\$11,950

- (c) You live in Kentucky or the District of Columbia and commute on a daily basis to your place of employment in Virginia.
- (d) You are a domiciliary or legal resident of Maryland, Pennsylvania or West Virginia whose only Virginia source income is from salaries and wages and such salaries and wages are subject to income taxation by your state of domicile.

**Purpose.** Complete Form MW507 so that your employer can withhold the correct Maryland income tax from your pay. Consider completing a new Form MW507 each year and when your personal or financial situation changes.

**Basic Instructions.** Enter on line 1 below, the number of personal exemptions that you will be claiming on your tax return; however, if you wish to claim more exemptions, or if your adjusted gross income will be more than \$100,000 if you are filing single or married filing separately (\$150,000, if you are filing jointly or as head of household), you must complete the Personal Exemption Worksheet on page 2. Complete the Personal Exemption Worksheet on page 2 to further adjust your Maryland withholding based upon itemized deductions, and certain other expenses that exceed your standard deduction and are not being claimed at another job or by your spouse. However, you may claim fewer (or zero) exemptions.

**Additional withholding per pay period under agreement with employer.** If you are not having enough tax withheld, you may ask your employer to withhold more by entering an additional amount on line 2.

**Exemption from withholding.** You may be entitled to claim an exemption from the withholding of Maryland income tax if:

- a. last year you did not owe any Maryland Income tax and had a right to a full refund of any tax withheld; AND
- b. this year you do not expect to owe any Maryland income tax and expect to have a right to a full refund of all income tax withheld.

If you are eligible to claim this exemption, complete Line 3 and your employer will not withhold Maryland income tax from your wages.

Students and Seasonal Employees whose annual income is below the minimum filing requirements

should claim exemption from withholding. This provides more income throughout the year and avoids the necessity of filing a Maryland income tax return.

**Certification of nonresidence in the State of Maryland.** Complete Line 4. This line is to be completed by residents of the District of Columbia, Pennsylvania, Virginia or West Virginia who are employed in Maryland and who do not maintain a place of abode in Maryland for 183 days or more.

Line 4 is **NOT** to be used by residents of other states who are working in Maryland, because such persons are liable for Maryland income tax and withholding from their wages is required.

If you are domiciled in the District of Columbia, Pennsylvania or Virginia and maintain a place of abode in Maryland for 183 days or more, you become a statutory resident of Maryland and you are required to file a resident return with Maryland reporting your total income. You must apply to your domicile state for any tax credit to which you may be entitled under the reciprocal provisions of the law. If you are domiciled in West Virginia, you are not required to pay Maryland income tax on wage or salary income, regardless of the length of time you may have spent in Maryland.

Under the Servicemembers Civil Relief Act, as amended by the Military Spouses Residency Relief Act, you may be exempt from Maryland income tax on your wages if (i) your spouse is a member of the armed forces present in Maryland in compliance with military orders; (ii) you are present in Maryland solely to be with your spouse; and (iii) you maintain your domicile in another state. If you claim exemption under the SCRA enter your state of domicile (legal residence) on Line 5; enter "EXEMPT" in the box to the right on Line 5; and attach a copy of your spousal military identification card to Form MW507. **Beginning 2011, you must also complete and attach Form MW507M.**

Duties and responsibilities of employer. Retain this certificate with your records. You are required to submit a copy of this certificate and accompanying attachments to the Compliance Division, Compliance Programs Section, 301 West Preston Street, Baltimore, MD 21201, when received if:

- 1. you have any reason to believe this certificate is incorrect;
- 2. the employee claims more than 10 exemptions;
- 3. the employee claims an exemption from withholding because he/she had no tax liability for the preceding tax year, expects to incur no tax liability this year and the wages are expected to exceed \$200 a week;
- 4. the employee claims an exemption from withholding on the basis of nonresidence; or
- 5. the employee claims an exemption from withholding under the Military Spouses Residency Relief Act.

Upon receipt of any exemption certificate (Form MW 507), the Compliance Division will make a determination and notify you if a change is required.

Once a certificate is revoked by the Comptroller, the employer must send any new certificate from the employee to the Comptroller for approval before implementing the new certificate.

If an employee claims exemption under 3 or 5 above, a new exemption certificate must be filed by February 15th of the following year.

**Duties and responsibilities of employee.** If, on any day during the calendar year, the number of withholding exemptions that the employee is entitled to claim is less than the number of exemptions claimed on the withholding exemption certificate in effect, the employee shall file a new withholding exemption certificate with the employer within 10 days after the change occurs.

**Employee's Maryland Withholding Exemption Certificate**

Print full name	Social Security number
Street Address City, State, Zip	County of residence (or Baltimore City)

- Single     
  Married (surviving spouse or unmarried Head of Household) Rate     
  Married, but withhold at Single Rate

1. Total number of exemptions you are claiming not to exceed line f in Personal Exemption Worksheet on page 2 .....	1.	
2. Additional withholding per pay period under agreement with employer .....	2.	\$
3. I claim exemption from withholding because I do not expect to owe Maryland tax. See instructions above and check boxes that apply. <input type="checkbox"/> a. Last year I did not owe any Maryland Income tax and had a right to a full refund of all Income tax withheld and <input type="checkbox"/> b. This year I do not expect to owe any Maryland income tax and expect to have the right to a full refund of all income tax withheld. (This includes seasonal and student employees whose annual income will be below the minimum filing requirements). If both a and b apply, enter year applicable _____ (year effective) Enter "EXEMPT" here.....	3.	
4. I claim exemption from withholding because I am domiciled in one of the following states. Check state that applies. <input type="checkbox"/> District of Columbia <input type="checkbox"/> Pennsylvania <input type="checkbox"/> Virginia <input type="checkbox"/> West Virginia I further certify that I do not maintain a place of abode in Maryland as described in the instructions above. Enter "EXEMPT" here...	4.	
5. I certify that I am a legal resident of the state of _____ and am not subject to Maryland withholding because I meet the requirements set forth under the Servicemembers Civil Relief Act, as amended by the Military Spouses Residency Relief Act. Enter "EXEMPT" here .....	5.	

Under the **penalty of perjury**, I further certify that I am entitled to the number of withholding allowances claimed on line 1 above, or if claiming exemption from withholding, that I am entitled to claim the exempt status on line 3, 4 or 5, whichever applies.

Employee's signature	Date
Employer's Name and address including zip code (For employer use only)	Federal employer identification number

**Personal Exemptions Worksheet**

**Line 1**

- a. Multiply the number of your personal exemptions by the value of each exemption from the table below. (Generally the value of your exemption will be \$3,200; however, if your federal adjusted gross income is expected to be over \$100,000, the value of your exemption may be reduced. **Do not claim any personal exemptions that you are currently claiming at another job, or any exemptions being claimed by your spouse.** To qualify as your dependent, you must be entitled to an exemption for the dependent on your federal income tax return for the corresponding tax year. **NOTE:** Dependent taxpayers may not claim themselves as an exemption. . . . . a. \_\_\_\_\_
- b. Multiply the number of additional exemptions you are claiming for dependents who are 65 years of age or older by the value of each exemption from the table below. . . . . b. \_\_\_\_\_
- c. Enter the estimated amount of your itemized deductions (excluding state and local income taxes) that exceed the amount of your standard deduction, alimony payments, allowable childcare expenses, qualified retirement contributions, business losses and employee business expenses for the year. Do not claim any additional amounts you are currently claiming at another job; or any amounts being claimed by your spouse. **NOTE:** Standard deduction allowance is 15% of Maryland adjusted gross income with a minimum of \$1,500 and a maximum of \$2,000. . . . . c. \_\_\_\_\_
- d. Enter \$1,000 for additional exemptions for taxpayer and/or spouse at least 65 years of age and/or blind. . . . . d. \_\_\_\_\_
- e. Add total of lines a through d. . . . . e. \_\_\_\_\_
- f. Divide the amount on line e by \$3,200. **Drop any fraction. Do not round up.** This is the **maximum** number of exemptions you may claim for withholding tax purposes. . . . . f. \_\_\_\_\_

If Your federal AGI is		If you will file your tax return	
		Single or Married Filing Separately Your Exemption is	Joint, Head of Household or Qualifying Widow(er) Your Exemption is
\$100,000 or less		\$3,200	\$3,200
<b>Over</b>	<b>But not over</b>		
\$100,000	\$125,000	\$2,400	\$3,200
\$125,000	\$150,000	\$1,800	\$3,200
\$150,000	\$175,000	\$1,200	\$2,400
\$175,000	\$200,000	\$1,200	\$1,800
\$200,000	\$250,000	\$600	\$1,200
In excess of \$250,000		\$600	\$600

**FEDERAL PRIVACY ACT INFORMATION**

Social Security numbers must be included. The mandatory disclosure of your Social Security number is authorized by the provisions set forth in the Tax-General Article of the Annotated Code of Maryland. Such numbers are used primarily to administer and enforce the individual income tax laws and to exchange income tax information with the Internal Revenue Service, other states and other tax officials of this state. Information furnished to other agencies or persons shall be used solely for the purpose of administering tax laws or the specific laws administered by the person having statutory right to obtain it.

# Form W-4 (2011)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

**Exemption from withholding.** If you are exempt, complete **only** lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2011 expires February 16, 2012. See Pub. 505, Tax Withholding and Estimated Tax.

**Note.** If another person can claim you as a dependent on his or her tax return, you cannot claim exemption from withholding if your income exceeds \$950 and includes more than \$300 of unearned income (for example, interest and dividends).

**Basic instructions.** If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple jobs situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

**Head of household.** Generally, you may claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 919, How Do I Adjust My Tax Withholding, for information on converting your other credits into withholding allowances.

**Nonwage income.** If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using

Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 919 to find out if you should adjust your withholding on Form W-4 or W-4P.

**Two earners or multiple jobs.** If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 919 for details.

**Nonresident alien.** If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

**Check your withholding.** After your Form W-4 takes effect, use Pub. 919 to see how the amount you are having withheld compares to your projected total tax for 2011. See Pub. 919, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Married).

## Personal Allowances Worksheet (Keep for your records.)

<b>A</b>	Enter "1" for <b>yourself</b> if no one else can claim you as a dependent . . . . .	<b>A</b>	<u>      </u>
<b>B</b>	Enter "1" if: <span style="font-size: 2em; vertical-align: middle;">{</span> <ul style="list-style-type: none"> <li>• You are single and have only one job; or</li> <li>• You are married, have only one job, and your spouse does not work; or</li> <li>• Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.</li> </ul> <span style="font-size: 2em; vertical-align: middle;">}</span> . . . . .	<b>B</b>	<u>      </u>
<b>C</b>	Enter "1" for your <b>spouse</b> . But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) . . . . .	<b>C</b>	<u>      </u>
<b>D</b>	Enter number of <b>dependents</b> (other than your spouse or yourself) you will claim on your tax return . . . . .	<b>D</b>	<u>      </u>
<b>E</b>	Enter "1" if you will file as <b>head of household</b> on your tax return (see conditions under <b>Head of household</b> above) . . . . .	<b>E</b>	<u>      </u>
<b>F</b>	Enter "1" if you have at least \$1,900 of <b>child or dependent care expenses</b> for which you plan to claim a credit . . . . . ( <b>Note.</b> Do <b>not</b> include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.)	<b>F</b>	<u>      </u>
<b>G</b>	<b>Child Tax Credit</b> (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information. <ul style="list-style-type: none"> <li>• If your total income will be less than \$61,000 (\$90,000 if married), enter "2" for each eligible child; then <b>less</b> "1" if you have three or more eligible children.</li> <li>• If your total income will be between \$61,000 and \$84,000 (\$90,000 and \$119,000 if married), enter "1" for each eligible child plus "1" <b>additional</b> if you have six or more eligible children . . . . .</li> </ul>	<b>G</b>	<u>      </u>
<b>H</b>	Add lines A through G and enter total here. ( <b>Note.</b> This may be different from the number of exemptions you claim on your tax return.) ▶	<b>H</b>	<u>      </u>
	For accuracy, <b>complete all worksheets that apply.</b> <span style="font-size: 2em; vertical-align: middle;">{</span> <ul style="list-style-type: none"> <li>• If you plan to <b>itemize</b> or <b>claim adjustments to income</b> and want to reduce your withholding, see the <b>Deductions and Adjustments Worksheet</b> on page 2.</li> <li>• If you have <b>more than one job</b> or are <b>married and you and your spouse both work</b> and the combined earnings from all jobs exceed \$40,000 (\$10,000 if married), see the <b>Two-Earners/Multiple Jobs Worksheet</b> on page 2 to avoid having too little tax withheld.</li> <li>• If <b>neither</b> of the above situations applies, <b>stop here</b> and enter the number from line H on line 5 of Form W-4 below.</li> </ul> <span style="font-size: 2em; vertical-align: middle;">}</span>		

----- Cut here and give Form W-4 to your employer. Keep the top part for your records. -----

Form <b>W-4</b> Department of the Treasury Internal Revenue Service	<h2 style="margin: 0;">Employee's Withholding Allowance Certificate</h2> <p style="margin: 0;">▶ <b>Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.</b></p>	OMB No. 1545-0074  <span style="font-size: 2em; font-weight: bold;">2011</span>
1 Type or print your first name and middle initial.	Last name	2 Your social security number
Home address (number and street or rural route)		3 <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. <b>Note.</b> If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.
City or town, state, and ZIP code		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. ▶ <input type="checkbox"/>
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)	6 Additional amount, if any, you want withheld from each paycheck	5 <u>      </u> 6 \$ <u>      </u>
7 I claim exemption from withholding for 2011, and I certify that I meet <b>both</b> of the following conditions for exemption. <ul style="list-style-type: none"> <li>• Last year I had a right to a refund of <b>all</b> federal income tax withheld because I had <b>no</b> tax liability <b>and</b></li> <li>• This year I expect a refund of <b>all</b> federal income tax withheld because I expect to have <b>no</b> tax liability.</li> </ul> If you meet both conditions, write "Exempt" here . . . . . ▶		7 <u>      </u>
Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.		
<b>Employee's signature</b> (This form is not valid unless you sign it.) ▶		<b>Date</b> ▶
8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.)	9 Office code (optional)	10 Employer identification number (EIN)

### Deductions and Adjustments Worksheet

**Note.** Use this worksheet *only* if you plan to itemize deductions or claim certain credits or adjustments to income.

<b>1</b>	Enter an estimate of your 2011 itemized deductions. These include qualifying home mortgage interest, charitable contributions, state and local taxes, medical expenses in excess of 7.5% of your income, and miscellaneous deductions . . . . .	<b>1</b>	\$ _____
<b>2</b>	Enter: $\left\{ \begin{array}{l} \$11,600 \text{ if married filing jointly or qualifying widow(er)} \\ \$8,500 \text{ if head of household} \\ \$5,800 \text{ if single or married filing separately} \end{array} \right\}$ . . . . .	<b>2</b>	\$ _____
<b>3</b>	<b>Subtract</b> line 2 from line 1. If zero or less, enter “-0-” . . . . .	<b>3</b>	\$ _____
<b>4</b>	Enter an estimate of your 2011 adjustments to income and any additional standard deduction (see Pub. 919)	<b>4</b>	\$ _____
<b>5</b>	<b>Add</b> lines 3 and 4 and enter the total. (Include any amount for credits from the <i>Converting Credits to Withholding Allowances for 2011 Form W-4 Worksheet</i> in Pub. 919.) . . . . .	<b>5</b>	\$ _____
<b>6</b>	Enter an estimate of your 2011 nonwage income (such as dividends or interest) . . . . .	<b>6</b>	\$ _____
<b>7</b>	<b>Subtract</b> line 6 from line 5. If zero or less, enter “-0-” . . . . .	<b>7</b>	\$ _____
<b>8</b>	<b>Divide</b> the amount on line 7 by \$3,700 and enter the result here. Drop any fraction . . . . .	<b>8</b>	_____
<b>9</b>	Enter the number from the <b>Personal Allowances Worksheet</b> , line H, page 1 . . . . .	<b>9</b>	_____
<b>10</b>	<b>Add</b> lines 8 and 9 and enter the total here. If you plan to use the <b>Two-Earners/Multiple Jobs Worksheet</b> , also enter this total on line 1 below. Otherwise, <b>stop here</b> and enter this total on Form W-4, line 5, page 1	<b>10</b>	_____

### Two-Earners/Multiple Jobs Worksheet (See *Two earners or multiple jobs* on page 1.)

**Note.** Use this worksheet *only* if the instructions under line H on page 1 direct you here.

<b>1</b>	Enter the number from line H, page 1 (or from line 10 above if you used the <b>Deductions and Adjustments Worksheet</b> )	<b>1</b>	_____
<b>2</b>	Find the number in <b>Table 1</b> below that applies to the <b>LOWEST</b> paying job and enter it here. <b>However</b> , if you are married filing jointly and wages from the highest paying job are \$65,000 or less, do not enter more than “3” . . . . .	<b>2</b>	_____
<b>3</b>	If line 1 is <b>more than or equal to</b> line 2, subtract line 2 from line 1. Enter the result here (if zero, enter “-0-”) and on Form W-4, line 5, page 1. <b>Do not</b> use the rest of this worksheet . . . . .	<b>3</b>	_____
<b>Note.</b> If line 1 is <b>less than</b> line 2, enter “-0-” on Form W-4, line 5, page 1. Complete lines 4 through 9 below to figure the additional withholding amount necessary to avoid a year-end tax bill.			
<b>4</b>	Enter the number from line 2 of this worksheet . . . . .	<b>4</b>	_____
<b>5</b>	Enter the number from line 1 of this worksheet . . . . .	<b>5</b>	_____
<b>6</b>	<b>Subtract</b> line 5 from line 4 . . . . .	<b>6</b>	_____
<b>7</b>	Find the amount in <b>Table 2</b> below that applies to the <b>HIGHEST</b> paying job and enter it here . . . . .	<b>7</b>	\$ _____
<b>8</b>	<b>Multiply</b> line 7 by line 6 and enter the result here. This is the additional annual withholding needed . . . . .	<b>8</b>	\$ _____
<b>9</b>	Divide line 8 by the number of pay periods remaining in 2011. For example, divide by 26 if you are paid every two weeks and you complete this form in December 2010. Enter the result here and on Form W-4, line 6, page 1. This is the additional amount to be withheld from each paycheck . . . . .	<b>9</b>	\$ _____

**Table 1**

**Table 2**

Married Filing Jointly		All Others		Married Filing Jointly		All Others	
If wages from <b>LOWEST</b> paying job are—	Enter on line 2 above	If wages from <b>LOWEST</b> paying job are—	Enter on line 2 above	If wages from <b>HIGHEST</b> paying job are—	Enter on line 7 above	If wages from <b>HIGHEST</b> paying job are—	Enter on line 7 above
\$0 - \$5,000 -	0	\$0 - \$8,000 -	0	\$0 - \$65,000	\$560	\$0 - \$35,000	\$560
5,001 - 12,000 -	1	8,001 - 15,000 -	1	65,001 - 125,000	930	35,001 - 90,000	930
12,001 - 22,000 -	2	15,001 - 25,000 -	2	125,001 - 185,000	1,040	90,001 - 165,000	1,040
22,001 - 25,000 -	3	25,001 - 30,000 -	3	185,001 - 335,000	1,220	165,001 - 370,000	1,220
25,001 - 30,000 -	4	30,001 - 40,000 -	4	335,001 and over	1,300	370,001 and over	1,300
30,001 - 40,000 -	5	40,001 - 50,000 -	5				
40,001 - 48,000 -	6	50,001 - 65,000 -	6				
48,001 - 55,000 -	7	65,001 - 80,000 -	7				
55,001 - 65,000 -	8	80,001 - 95,000 -	8				
65,001 - 72,000 -	9	95,001 -120,000 -	9				
72,001 - 85,000 -	10	120,001 and over	10				
85,001 - 97,000 -	11						
97,001 -110,000 -	12						
110,001 -120,000 -	13						
120,001 -135,000 -	14						
135,001 and over	15						

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The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.