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Substitute State Income Tax Withholding Election Form For Qualified Periodic Pension or Annuity Payments

Important: If your state has an income tax withholding certificate for Pension or Annuity payments, you should complete and submit your state form not the Aetna substitute form. If you have any questions regarding the taxability of your pension or the correct amount of taxes you need withheld, you should consult with your personal tax advisor. Information regarding income tax withholding allowances, etc. can be obtained from your state taxing authority. Individuals who elect out of withholding or do not have enough income tax withheld may be required to pay estimated taxes. If withholding and estimated tax payments are not sufficient, penalties may apply under your state's estimated tax rules. Aetna is not a state tax expert and is not authorized to provide tax advice.

Please print the following information: Note: There is No State Income Tax in AK, FL, NH, NV, SD, TN, TX, WA, and WY

Social Security Number ____ : ____ : _____	Resident Tax State	Full Name (First Name, Middle Initial, Last Name)
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To make a new election or revoke a prior election, please complete the appropriate election below:

<input type="checkbox"/> 1. Residents of AZ: I elect to have state income tax withholding calculated at the following percentage of the taxable amount of my pension payments: <input type="checkbox"/> 0.8% <input type="checkbox"/> 1.3% <input type="checkbox"/> 1.8% <input type="checkbox"/> 2.7% <input type="checkbox"/> 3.6% <input type="checkbox"/> 4.2% <input type="checkbox"/> 5.1% Optional additional amount to be withheld: \$ _____ .00	<input type="checkbox"/> 2. Residents of MA: I have elected Federal income tax withholding and I elect to have my state income tax withholding calculated based on the following number of withholding allowances: _____. <input type="checkbox"/> Check here if you are blind <input type="checkbox"/> Check here if your spouse is blind
<input type="checkbox"/> 3. Residents of CT, IN, MD, MO, NJ, NY, WV: I elect to have the following amount of my state income tax withheld from my pension payments: \$ _____ .00	<input type="checkbox"/> 4. Residents of PA: I elect to have state income tax, at the rate of 3.07% of the taxable amount, withheld from my pension payments.
<input type="checkbox"/> 5. Residents of CA and WI: Please choose one of the following income tax withholding options: <input type="checkbox"/> I elect to have my state income tax withholding calculated based on the following marital status, number of withholding allowances, and any additional amount indicated below: <input type="checkbox"/> Single or Married, but withhold at the higher Single Rate <input type="checkbox"/> Married Number of Withholding Allowances: _____ Optional additional amount to be withheld: \$ _____ .00 Or, <input type="checkbox"/> I elect to have the following amount of my state income tax withheld from my pension payment: \$ _____ .00	<input type="checkbox"/> 6. Residents of GA: I elect to have my state income tax withholding calculated based on the following marital status, number of withholding allowances, and any additional amount indicated below: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Separately (MS) <input type="checkbox"/> Married Filing Jointly – One spouse working (MO) <input type="checkbox"/> Married Filing Jointly – Both spouses working (MB) Number of Withholding Allowances: _____ Optional additional amount to be withheld: \$ _____ .00

Additional options and signature line (REQUIRED) can be found on the other side of this form.

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7. **Residents of all other states with state income tax:**
- I elect to have my state income tax withholding calculated based on the following marital status, number of withholding allowances, and any additional amount indicated below:
- Single or Married, but withhold at the higher Single Rate
- Married
- Number of Withholding Allowances:** _____
- Optional *additional* amount to be withheld: \$** _____ **.00**

8. I elect **not** to have state income tax withholding withheld from my pension payments. **Note: Residents of AR, CA, GA, IA, KS, MA, ME, NC, NE, OK, OR, VA, VT: you may not be able to elect "out" of state income tax withholding unless you have elected "out" of Federal income tax withholding.**

Signature: _____ **Telephone Number:** (____) _____ **Date:** _____

Aetna Life Insurance Company, Large Case Pensions, 151 Farmington Avenue, RTAA, Hartford, CT 06156-9260

1-800-952-2700

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