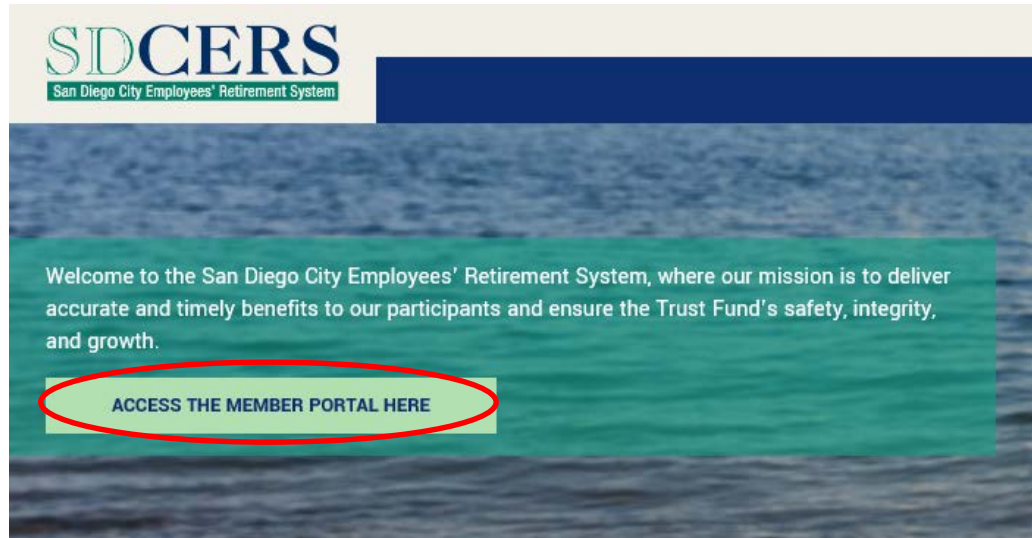


Tips for Updating Your Tax Withholding Preferences

Step #1:

To access your Member Portal account, please visit www.sdcers.org and log in to your **Member Portal**.

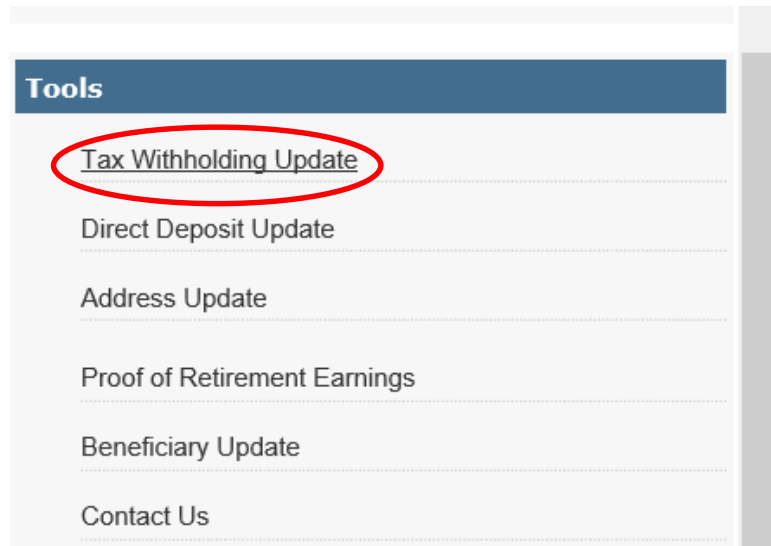
*If you haven't registered for a Member Portal account, please register and then follow these steps.



Step #2:

Once you've logged into your account, see the left menu under Tools, and click on:

“Tax Withholding Update”

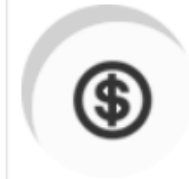


Alerts & Messages



[You have 2 messages](#)

Retirement Account Details



[View Details](#)

Tax Withholding Update

By clicking the "Change Federal Tax" or "Change State Tax" button, you are authorizing SDCERS to withhold the amount(s) you entered above from your monthly retirement benefit for Federal and/or California income tax purposes. SDCERS will not deduct state taxes for retirees residing outside of California. You will be responsible for paying state taxes if you reside in a different state. If you elect not to have 'withholding' apply to your benefit or if you do not have enough tax withheld, you may be responsible for payment of estimated tax. You may incur penalties if your estimated tax payments and withholdings are not sufficient. SDCERS staff is not authorized or qualified to provide tax advice.

Step #3:

Click the "Change Federal Tax" or "Change CA State Tax" button to make your changes.

Current Tax Withholding							
Tax Type	Payment Type	Withholding Type	Filing Status	Exemptions	No Withholding	Effective Date	End Date
Federal Tax	Monthly	Tax Table	Single		N	06/08/2017	
State Tax	Monthly	Tax Table	Single		N	06/08/2017	
Federal Tax	DROP Monthly	Tax Table	Married	3		07/01/2009	
State Tax	DROP Monthly	Tax Table	Married at Single Rate	3		07/01/2009	

Change Federal Tax **Change CA State Tax**

Step #4:

Locate the "Payment Type" box and click on the dropdown menu. Select the portion of your benefit you'd like to change.

Now you are able to make your changes by selecting "Tax Table" or "Tax Table Plus Additional Amount" from the "Withholding Type" dropdown menu. You will need to select your filing status and list the number of exemptions you will claim.

If "Tax Table Plus Additional Amount" is selected, please indicate the additional amount in the "Additional Withholding Amount" box.

You can compare tax withholding options to assist you in making your selection by clicking "Calculate."

Step #5: Once you are satisfied with your selection, check the "Authorization" box and click "Submit" to make your changes as of the listed effective date.

Federal Tax Withholding

To view estimated Federal tax withholdings, make selections and click the Calculate button below. Once determined, review and confirm Authorization below and click Submit button. For additional information regarding tax withholding click [here](#) to view the W-4P instruction booklet or IRS Publication 505.

Tax Type : Federal Tax

Effective : January 2020

*Payment Type : **Monthly**

Withholding Type : Tax Table Plus Additional Amount

→ Filing Status : Married

→ Exemptions : 2

*Additional Withholding Amount : \$20.00

Do Not Withhold Taxes :

Current Taxable Amount : \$0.00

Calculated Tax Amount : \$0.00 **Calculate**

Authorization: By checking this box and clicking submit below, you are authorizing SDCERS to withhold the amount(s) you entered above. If you elect not to apply withholdings, or do not have sufficient taxes withheld, you are still responsible for your required taxes. You may incur penalties if your estimated tax payment and withholdings are not sufficient. SDCERS staff is not authorized or qualified to provide tax advice.

Submit