



Genworth Life
 Genworth Life & Annuity
 3100 Albert Lankford Drive
 Lynchburg, VA 24501-4996
 Phone: 800 221.9501
 Tel: 888 GENWORTH (888 436.9678)
 Fax: 434 948.5440

Tax withholding for annuity payments

from Genworth Life Insurance Company and
 Genworth Life and Annuity Insurance Company

Owner information

Contract number

.....

Owner name *please print*

.....

Owner Social Security/Tax ID number

.....

Income tax withholding

Federal withholding

If you leave this section blank, we will withhold federal income tax at the rate for "Married" with 3 withholding allowances.

If you do not provide us with your Social Security number, we will withhold federal income tax at the rate for "Single" with no withholding allowances.

Do you want federal income tax withheld?

Yes No

If **yes**, answer IRS Form **W-4P** questions below.

W-4P questions:

1. Marital status

Single Married Married, but withhold at higher "Single" rate

2. Number of withholding allowances

3. Additional withholding

Enter additional amount, if any, you would like withheld from each annuity payment.

\$

State withholding

- If you live in AR or GA, **you must complete the federal W-4P questions above** regardless of whether you want federal income tax to be withheld from your annuity payments. State income tax will be withheld based on your answers.
- AZ withholding is a percentage you elect on Form A-4P.
- **If you want state income tax withheld** in AL, CO, CT, DC, DE, ID, IL, IN, KY, LA, MD, MN, MO, MT, ND, NJ, NM, NY, OH, PA, RI, SC, UT, VA (IRAs & SEPs), WI and WV **you must designate a state withholding amount.**
- **We cannot withhold state income tax** in AK, FL, HI, NH, MS, NV, SD, TN, TX, WA and WY.
- Unless you elect below to not have state income tax withheld, if you live in MI (retirement benefits only - attach MI-4P to claim exemptions) NC, OK, OR or VA (except for IRAs and SEPs; attach VA-4P to claim exemptions) and have federal income tax withheld, state withholding is required at the current state rate or higher amount you choose, based on your responses to the IRS Form W-4P questions above.
- Unless you elect below to not have state income tax withheld, if you live in CA, NC, OK and OR and have federal income tax withheld, state withholding is required at the current state rate or higher amount you choose, based on your responses to the IRS Form W-4P questions above.
- If you live in IA, KS, MA, ME, NE or VT and you have federal income tax withheld, you must complete your state's withholding election form or the IRS Form W-4P questions above. State income tax will be withheld based on your answers.

State income tax withholding amount. *Select one*

Withhold state income tax from each annuity payment. Do not withhold state income tax from each annuity payment.

\$

.....%

Tax withholding for annuity payments

Income tax withholding *Continued*

Tax information

- Withholding will apply only to the portion of each annuity payment that is subject to federal income tax.
- Even if you elect not to have state income tax withheld from your annuity payments, you are liable for the payment of any applicable state income tax on the taxable portion. You may also be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate. You may be able to avoid quarterly tax payments by having enough tax withheld from your annuity payments.
- It is important you provide us with the proper Social Security or taxpayer identification number. If you do not supply this number, we will proceed with automatic withholding of federal, and of any required state income tax.
- If applicable, the state withholding certificate may state special rules and conditions for withholding state income tax from your annuity payments.
- Consult your personal tax advisor regarding the tax status of distributions from your annuity.

Signature

Your signature indicates you have read and understand all sections of this form. **If you are a Trustee, Attorney-in-Fact, Guardian, Conservator or other Fiduciary, you must sign in your capacity; (e.g. Jane Smith, Trustee) and attach relevant legal documentation.**

Signature of Joint Owner (if any) is required.

Owner signature

X

- Trustee Attorney-in-fact *POA*
 Guardian Title/office:

Date of signature

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Joint owner signature

X

- Trustee Attorney-in-fact *POA*
 Guardian Title/office:

Date of signature

.

Mailing instructions

Regular First Class Mail:
Immediate Annuities:
 P.O. Box 6158
 Lynchburg, VA 24505-6158

Overnight delivery:
 3100 Albert Lankford Drive
 Lynchburg, VA 24501