Turlock Unified School District

Finance & Accountability

Date: January 28, 2020

To: All Employees

From: Marjorie Bettencourt, Assistant Superintendent of Finance & Accountability

RE: 2020 Form W-4

The 2020 Form W-4, *Employee's Withholding Certificate*, *is* very different from previous Form W-4 versions.

For employees paid for the first time or anyone who makes withholding changes on or after January 1, 2020 will be required to use the new form. Before completing the 2020 Form W-4, please read the instructions that are included with the form.

Step 1 is your personal information;
Step 2 is households with multiple jobs;
Step 3 is to claim tax credits for dependents;
Step 4 is other adjustments (additional income such as interest and dividends, itemized deductions that exceed the standard deduction, and extra tax you want withheld); and
Step 5 is employee signature.

You must complete step 1 and step 5. Although, steps 2, 3, and 4 are optional, completing them may help ensure your federal income tax withholding will more accurately match your tax liability.

Existing employees are not required to complete the revised form. Due to the federal tax law changes that took place in 2018, the Internal Revenue Service (IRS) has designed the withholding tables so they will work with both the new and prior year W-4 form. Though the IRS does not require existing employees to complete the revised form, the IRS recommends that you perform a "paycheck checkup" to see if you may need to adjust your current withholding. To conduct the "paycheck checkup", please use the IRS's Tax Withholding Estimator (www.irs.gov/W4App). To effectively use the estimator, it is helpful to have a copy of your most recent pay stub and tax return.

The IRS has published Frequently Asked Questions (FAQs) to assist in completing the form. (https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4).