



Employee Information

Employer: _____

Personal Information

Full Name: _____
First MI Last

Address: _____
Street Address – Apartment/Unit#

City State ZIP Code

Birth Date: _____ Email address: _____
(email and birthdate required for employee document delivery)

SSN: _____ Start Date: _____

Department: _____ Hourly/Salary Rate: _____

For Independent Contractor/1099: TIN: _____

For Visa/Foreign Workers: Specify Visa type or include I-9

Deductions

Health: _____ 401k / Roth: _____

Dental: _____ IRA: _____

Vision: _____ Aflac: _____

Union Dues: _____ Other: _____

Tax & W-4 Information *refer to W-4 forms for guidance

Forward Federal W-4 and applicable State W-4 for to report Personal Income Tax Withholding

- Employees who select **Married filing jointly** in Step 1 – should continue on to complete Step 2 of the W-4, especially **IF** they (1) hold more than one job at a time, OR (2) their spouse also works.
- **Omitting Step 2 may result in being under-withheld and owing additional tax at the end of the year.**

One of the following options is recommended for accurate withholding:

- Use the IRS tax estimator at <https://apps.irs.gov/app/tax-withholding-estimator>
- Use the multiple jobs worksheet on page 3 of the W-4 form www.dsipayroll.com/forms
- Check box (c) if there are two jobs total (ie Employee & Spouse) and the pay is similar

Additional Information