

Employee's Withholding Certificate

▶ **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**
▶ **Give Form W-4 to your employer.**
▶ **Your withholding is subject to review by the IRS.**

2021

Step 1: Enter Personal Information	(a) First name and middle initial	Last name	(b) Social security number
	Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
	City or town, state, and ZIP code		
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying widow(er) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld ▶

TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____ Multiply the number of other dependents by \$500 ▶ \$ _____ Add the amounts above and enter the total here 3 \$ _____		
Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income	4(a)	\$ _____
	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here	4(b)	\$ _____
	(c) Extra withholding. Enter any additional tax you want withheld each pay period	4(c)	\$ _____

Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.		
	▶ _____ ▶ Employee's signature (This form is not valid unless you sign it.)		▶ _____ ▶ Date

Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)
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Onboarding checklist

This onboarding checklist will help ensure your new hires are set up for success in their new role, and will make sure you don't miss any critical steps. Be sure to begin the onboarding process at least one week before your new employee's start date.

First engagement

- Obtain signed job acceptance
- Confirm start date
- Send new employee welcome email

Prepare new hire paperwork

- Tax forms (i.e., W-4 or W-9)
- Employment contract
- Non-disclosure, non-compete or other legal documents
- Employee handbook
- Benefits literature
- Job description

Procure devices and equipment

- Computer (including keyboard, mouse, etc.)
- Phone
- Access to shared devices (printer, copier, fax machine, etc.)
- Mobile phone, tablet, or other additional job-specific devices

Set up accounts and create logins

- WiFi access
- Voicemail
- Email
- Time clock system
- Access to CRM, project management software, or other job-specific technology
- Put in request for security clearance (if applicable)
- Add employee to relevant email distribution lists

Set up workspace

- Reserve an office, cubicle or workstation
- Ensure space has a desk, chair or other necessary office furniture
- Provide necessary office supplies
- Provide a branded welcome kit (if applicable)

First day

- Greet new employee
- Provide card, badge or other security assets
- Perform building tour
- Introduce new hire to team
- Send new hire announcement email
- Schedule team lunch
- Provide training plan

Orientation

- Complete all remaining new hire paperwork
- Discuss benefits and insurance plans
- Review employee handbook
- Review safety policies
- Review technology policies and support process
- Assign a peer mentor

Schedule check-in plan

- Obtain onboarding feedback
- Schedule one-week check-in
- Schedule 30-day check-in
- Schedule 60-day check-in
- Schedule 90-day check-in