SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO
300 E. BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 800-878-5853 • www.ohsers.org

SCHOOL DISTRICT INCOME TAX WITHHOLDING FORM

Name: _____

Address: _____City, State ZIP: _____

Last Four Digits of Social Security Number or Full Member ID: _____

For information about School District Income Taxes, **please see the back of this form**.

Monthly Payments: If you are receiving monthly payments from more than one SERS account, please indicate all accounts you want updated with the following tax withholding information. If none are selected, all accounts will be updated.

☐ Service Retirement Account ☐ Disability Allowance Account ☐ Alternate Payee
☐ Survivor Benefit Account ☐ Reemployed Annuity Account

☐ **Box 1** - I elect **not** to have School District Income Tax withheld from my monthly payment.

☐ **Box 2** – I elect to have School District Income Tax withheld from my monthly payment for the following school district.

Please enter the school district and four-digit school district number of your primary residence.

School district of residence: _____ School district number: _____
Required

Withhold $_____.00 (whole dollars) from each of your monthly payments.

One-Time Payments: Please select the one-time payment you want updated with the following tax withholding information.

☐ Partial Lump Sum Option (PLOP) ☐ Refund
☐ Reemployed Retiree Lump Sum
☐ I elect to have School District Income Tax withheld from my one-time payment for the following school district.

Please enter the school district and four-digit school district number of your primary residence.

School district of residence: _____ School district number: _____
Required

Withhold $_____.00 (whole dollars) from your one-time payment.

Your School District Income Tax Withholding selection will remain in effect until you change or cancel it by submitting a new School District Income Tax Withholding Form.

_____ _____
Signature Date

Instructions:
Your SERS pension amount may be subject to local school district income taxes in Ohio. However, SERS is not required to withhold amounts for school district income tax unless you choose to have a specific amount withheld.

If you do not know your school district of residence or its school district number, use *The Finder* at **tax.ohio.gov**. You can also verify your school district by contacting your county auditor or county board of elections.

If you have any questions regarding your tax obligations, contact your tax advisor. SERS cannot provide any tax advice including, but not limited to, the following: your tax obligations, your school district of residence, your school district's tax rate, or the withholding amount.