

WITHHOLDING TAX STATEMENT 1964

Federal taxes withheld from wages

Type or print EMPLOYER'S identification number, name, and address above.

Copy A—For District Director

SOCIAL SECURITY INFORMATION		INCOME TAX INFORMATION	
\$ F.I.C.A. employee tax withheld, if any	\$ Total F.I.C.A. wages paid in 1964	\$ Federal income tax withheld, if any	\$ Total wages* paid in 1964
<div style="font-size: 2em; font-weight: bold; margin-top: 50px;">L</div>		EMPLOYER: See instructions on other side.	
		FOR USE OF INTERNAL REVENUE SERVICE	
		Employee's copy and, employer's copy compared	

Type or print EMPLOYEE'S social security account no., name, and address above.

FORM W-2—U.S. Treasury Department, Internal Revenue Service

* Before payroll deductions or "sick pay" exclusion.

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FORM W-2—U.S. Treasury Department, Internal Revenue Service

* Before payroll deductions or "sick pay" exclusion.

TO EMPLOYER:

1. Prepare this form for each employee (a) from whom income tax has been withheld during the year or (b) whose wages, for purposes of income tax withholding, exceeded the amount of one withholding exemption for any payroll period (even though no income tax was withheld).
2. Fill in—(a) Your identification number, name, and address.
 - (b) Total amount of F.I.C.A. employee tax (*not the employer tax*) deducted and withheld, if any (but if there was an adjustment in 1964 to correct the tax for a prior year enter the amount withheld in 1964 increased by the adjustment for an overcollection or decreased by the adjustment for an under-collection). If F.I.C.A. wages were paid but no employee tax was deducted, enter “None” or “0.”
 - (c) Total wages paid (before payroll deductions) subject to the Federal Insurance Contributions Act. Non-cash remuneration is considered wages. If not subject to F.I.C.A., enter “None” or “0.” No F.I.C.A. wage entry need be made if (1) F.I.C.A. wages exactly equal the total wages for income tax withholding purposes, or (2) F.I.C.A. wages are \$4,800 and the total wages for income tax withholding purposes exceed \$4,800.

★ U. S. GOVERNMENT PRINTING OFFICE 1963—O-693-324

TO EMPLOYER:

1. Prepare this form for each employee (a) from whom income tax has been withheld during the year or (b) whose wages, for purposes of income tax withholding, exceeded the amount of one withholding exemption for any payroll period (even though no income tax was withheld).
2. Fill in—(a) Your identification number, name, and address.
 - (b) Total amount of F.I.C.A. employee tax (*not the employer tax*) deducted and withheld, if any (but if there was an adjustment in 1964 to correct the tax for a prior year enter the amount withheld in 1964 increased by the adjustment for an overcollection or decreased by the adjustment for an under-collection). If F.I.C.A. wages were paid but no employee tax was deducted, enter “None” or “0.”
 - (c) Total wages paid (before payroll deductions) subject to the Federal Insurance Contributions Act. Non-cash remuneration is considered wages. If not subject to F.I.C.A., enter “None” or “0.” No F.I.C.A. wage entry need be made if (1) F.I.C.A. wages exactly equal the total wages for income tax withholding purposes, or (2) F.I.C.A. wages are \$4,800 and the total wages for income tax withholding purposes exceed \$4,800.

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★ U. S. GOVERNMENT PRINTING OFFICE 1963—O-693-324

- (d) The amount of income tax deducted and withheld. If no amount was deducted and withheld enter “None” or “0.”
 - (e) Total wages paid before any payroll deductions. Payments of “sick pay” and non-cash remuneration are considered wages. If an employer keeps the records described in section 7 of Circular E he may also enter amounts of excludable sick pay in the space adjacent to “Total wages* paid in 1964.” Any amount of sick pay shown in the space should be identified by the words “excludable sick pay.”
 - (f) The employee's social security account number, name, and address.
 - (g) State and local government employers which have been assigned an identification number with the prefix 69 should also show this number.
3. Give copies B and C to the employee (a) on or before January 31 following the calendar year if the employee is in your employ at the close of such year, or (b) within 30 days after the last payment of wages, if his employment is terminated before the close of such year.
 4. Forward copy A to the District Director of Internal Revenue in accordance with the instructions printed on Form 941.
 5. For further information see Circular E.

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Copy B—To be filed with employee's tax return

SOCIAL SECURITY INFORMATION		INCOME TAX INFORMATION	
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EMPLOYEE: This is not a tax return but you must file it with Form 1040A, or Form 1040. See instructions on other side and on back of copy C.

If you expect to owe more income tax for next year than will be withheld if you claim every exemption to which you are entitled, you may increase the withholding by claiming a smaller number of exemptions or you may enter into an agreement with your employer to have additional amounts withheld. See Form W-4.

FOR USE OF INTERNAL REVENUE SERVICE

Employee's copy and employer's copy compared

Type or print EMPLOYEE'S social security account no., name, and address above.

FORM W-2—U.S. Treasury Department, Internal Revenue Service

* Before payroll deductions or "sick pay" exclusion.

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NOTICE TO EMPLOYEE:

- 1. Income Tax Wages.**—This statement is important. It must be filed with your U.S. Income Tax return for 1964. If your account number, name, or address is stated incorrectly, correct the information on copy B and notify your employer.
- 2. Social Security Wages.**—If your wages were subject to social security taxes, but are not shown, your social security wages are the same as wages shown under “INCOME TAX INFORMATION,” but not more than \$4,800.
- 3. Credit For F.I.C.A. Tax.**—If more than \$174.00 of F.I.C.A. (social security) employee tax was withheld during 1964 because you received wages from more than one employer, the excess should be claimed as a credit against income tax. See instructions with your income tax return.

★ U. S. GOVERNMENT PRINTING OFFICE 1963—O-693-324

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Copy C—For employee's records

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NOTICE: If your wages were subject to social security taxes, but are not shown, your social security wages are the same as wages shown under "Income Tax Information," but not more than \$4,800.
Keep this copy as part of your tax records.

Type or print EMPLOYEE'S social security account no., name, and address above.

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FORM W-2—U.S. Treasury Department, Internal Revenue Service

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INSTRUCTIONS FOR FILING U.S. INCOME TAX RETURN

Who Must File—If your income in 1964 was \$600 or more (\$1,200 if 65 years of age or over), or your net earnings from self-employment were \$400 or more, you must file an income tax return. Forms may be obtained from the District Director of Internal Revenue, your employer, bank, or post office.

A single person with income of less than \$600 (\$1,200 if 65 years of age or over) should file a return to get a refund if tax was withheld. A married person with income less than her (his) own personal exemption(s) should file a joint return with husband or wife to get the smaller tax or larger refund. To assure any benefit of the split-income provisions, a married couple should file a joint income tax return.

Filing on Form 1040A.—Form 1040A may be used if your gross income (or the combined income of husband and wife) was less than \$10,000 and consisted entirely of wages reported on Withholding Tax Statements (Forms W-2) and not more than \$200 total of other wages, dividends, and interest.

If you file Form 1040A and your income is less than \$5,000, you may figure your own tax or let the Internal Revenue Service do it for you. A tax

table is provided in Form 1040A instructions for this purpose. This table allows about 10 percent of your total income for charitable contributions, interest, taxes, casualty losses, medical expenses, and miscellaneous items. If your income is \$5,000 or more but less than \$10,000, you must use the standard deduction and compute your own tax. A tax computation schedule is provided in Form 1040A instructions for this purpose. If you compute your tax any balance due must be paid in full with the return. If the Service computes the tax for you and there is an underpayment, a bill will be sent to you. In any case where there is an overpayment a refund check will be sent to you.

File Form 1040 instead of Form 1040A if—(1) you had income from sources other than wages, dividends, and interest, (2) either husband or wife itemizes deductions, (3) you claim the status of head of household or surviving husband or wife, (4) you claim dividends received credit or retirement income credit, (5) you claim “sick pay” exclusion for an amount included in wages shown on this form, or (6) you claim deductions for travel, transportation, or “outside salesman” expense.

Filing on Form 1040.—Form 1040 may be used by all taxpayers and is designed to report all types of income and deductions.

★ U. S. GOVERNMENT PRINTING OFFICE 1963—O-693-324

INSTRUCTIONS FOR FILING U.S. INCOME TAX RETURN

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Filing on Form 1040A.—Form 1040A may be used if your gross income (or the combined income of husband and wife) was less than \$10,000 and consisted entirely of wages reported on Withholding Tax Statements (Forms W-2) and not more than \$200 total of other wages, dividends, and interest.

If you file Form 1040A and your income is less than \$5,000, you may figure your own tax or let the Internal Revenue Service do it for you. A tax

table is provided in Form 1040A instructions for this purpose. This table allows about 10 percent of your total income for charitable contributions, interest, taxes, casualty losses, medical expenses, and miscellaneous items. If your income is \$5,000 or more but less than \$10,000, you must use the standard deduction and compute your own tax. A tax computation schedule is provided in Form 1040A instructions for this purpose. If you compute your tax any balance due must be paid in full with the return. If the Service computes the tax for you and there is an underpayment, a bill will be sent to you. In any case where there is an overpayment a refund check will be sent to you.

File Form 1040 instead of Form 1040A if—(1) you had income from sources other than wages, dividends, and interest, (2) either husband or wife itemizes deductions, (3) you claim the status of head of household or surviving husband or wife, (4) you claim dividends received credit or retirement income credit, (5) you claim “sick pay” exclusion for an amount included in wages shown on this form, or (6) you claim deductions for travel, transportation, or “outside salesman” expense.

Filing on Form 1040.—Form 1040 may be used by all taxpayers and is designed to report all types of income and deductions.

★ U. S. GOVERNMENT PRINTING OFFICE 1963—O-693-324

INSTRUCTIONS FOR FILING U.S. INCOME TAX RETURN

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Filing on Form 1040A.—Form 1040A may be used if your gross income (or the combined income of husband and wife) was less than \$10,000 and consisted entirely of wages reported on Withholding Tax Statements (Forms W-2) and not more than \$200 total of other wages, dividends, and interest.

If you file Form 1040A and your income is less than \$5,000, you may figure your own tax or let the Internal Revenue Service do it for you. A tax

table is provided in Form 1040A instructions for this purpose. This table allows about 10 percent of your total income for charitable contributions, interest, taxes, casualty losses, medical expenses, and miscellaneous items. If your income is \$5,000 or more but less than \$10,000, you must use the standard deduction and compute your own tax. A tax computation schedule is provided in Form 1040A instructions for this purpose. If you compute your tax any balance due must be paid in full with the return. If the Service computes the tax for you and there is an underpayment, a bill will be sent to you. In any case where there is an overpayment a refund check will be sent to you.

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Copy D—For employer

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\$ F.I.C.A. employee tax withheld, if any	\$ Total F.I.C.A. wages paid in 1964	\$ Federal income tax withheld, if any	\$ Total wages* paid in 1964

EMPLOYER: This copy is provided for your convenience in keeping your withholding records.

Type or print EMPLOYEE'S social security account no., name, and address above.

FORM W-2—U.S. Treasury Department, Internal Revenue Service

* Before payroll deductions or "sick pay" exclusion.

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