



This is a request to establish special taxability for a new deduction code in my computer system.

My client number is \_\_\_\_\_

Check one:

The plan is a \_\_\_\_\_ 401k plan

\_\_\_\_\_ Section 125 cafeteria plan

We also want this code set up in the following client branches (if applicable): \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,  
\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

The new deduction codes to be displayed in Company Deductions are:

Code	Description	Code	Description
_____	_____	_____	_____
_____	_____	_____	_____

I consulted with my plan administrator or tax accountant and would like to establish the taxability indicated below.

I circled "Yes" if this plan is TAX EXEMPT for:

FICA tax withheld and paid.....	Yes	No	
Federal Withholding tax.....	Yes	No	
Federal Unemployment tax paid.....	Yes	No	
State Withholding tax (if it applies).....	Yes	No	N/A
State Unemployment tax paid.....	Yes	No	
State Disability tax withheld.....	Yes	No	N/A
Local tax withheld (if it applies).....	Yes	No	N/A

I understand that once the plan is established it is very difficult to modify the taxability of the plan.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (Please Print) \_\_\_\_\_ Title \_\_\_\_\_

Dealership Name \_\_\_\_\_

Please fax the completed form to (937) 485-4039.

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