KENTUCKY PUBLIC PENSIONS AUTHORITY
1260 Louisville Road • Frankfort, KY 40601
Phone: (502) 696-8800 • Fax: (502) 696-8822 • kyret.ky.gov

Print Form

Form 6016
Revised 04/2021

Federal Income Tax Withholding Preference For Non-Periodic Payments to Estates

Deceased Member Information Please provide the member's Member ID or Social Security number in the Member ID box below.

Member Name:	Member ID:

Estate Information

Estate Name:	EIN or SSN:

Indicate your status below and provide your name.

☐ Executor ☐ Administrator ☐ Personal Representative ☐ Petitioner/Affiant Dispensing with Administration

Name(s):

Address:	City:	State:	Zip Code:
☐ Check here if this address is new.	Telephone Number:		

Withholding Preference

Non-periodic payments to an estate that are not eligible for a rollover include: refunds, a $5,000 Death Benefit and any other death benefits paid in a lump sum. The federal tax withholding preference applies to the portion of the benefit that is subject to income tax. No withholding will be made on the portion of the benefit that is not subject to income tax. The retirement systems will withhold 10% of the taxable amount for federal income taxes if you fail to submit a withholding preference. If the Estate is to receive a benefit from different member accounts, you will need to complete a tax withholding preference for each member's account. If the Estate is to receive benefits from multiple retirement system accounts for the same member, this withholding preference will be applied to all benefits received from these multiple systems. However, if you want the withholding preference to apply to a specific retirement system account, complete a separate tax withholding preference for each system account, and check the appropriate system for which you want this tax withholding preference applied.

☐ Kentucky Employees Retirement System (KERS)

☐ County Employees Retirement System (CERS)

☐ State Police Retirement System (SPRS)

Check only one of the following federal tax withholding preferences:

Select this box to have no taxes withheld from the distribution to the Estate.

☐ Do not withhold 10% Federal Tax.

Select this box to have 10% federal income tax withheld from the taxable portion of the distribution to the Estate.

☐ Withhold 10% Federal Tax.

I direct the Kentucky Public Pensions Authority to withhold federal income taxes as indicated on this federal income tax

Signature: _____ Date: _____

Signature:
(for multiple executors only) _____ Date: _____