

**U. S. DEPARTMENT OF
HOMELAND SECURITY**
U. S. Coast Guard
CG-1037 (Rev. 02-10)

**WTA (WITHHOLDING TAX ALLOWANCE) PAYMENT AND
EMPLOYEE AGREEMENT FOR REPAYMENT**

1. Name:

2. EmplID:

Purpose:

Each time an employee is reimbursed for moving expenses that are subject to federal tax withholding the WTA will be calculated and paid unless the employee fails to comply with the requirement below.

Payment of a RITA (Relocation Income Tax Allowance) is authorized to reimburse eligible transferred employees for substantially all of the additional federal, state, and local income taxes incurred by the employee (or by the employee and spouse if a joint tax return is filed) as a result of certain travel and transportation expenses and relocation allowances which are furnished in kind or reimbursed.

I agree to repay any excess amount paid to me in year 1, submit the required tax information, and file a claim for my RITA (Relocation Income Tax Allowance).

Each time an employee is reimbursed for moving expenses that are subject to federal tax withholding, the WTA will be calculated and paid unless the employee fails to comply with the requirement below.

Payment of a RITA is authorized to reimburse eligible transferred employees for substantially all of the additional federal, state, and local income taxes incurred by the employee (or by the employee and spouse if a joint tax return is filed) as a result of certain travel and transportation expenses and relocation allowances which are furnished in kind or reimbursed.

Failure of the employee to comply with this requirement will preclude the payment of the WTA. The RITA is calculated and can be claimed in year 2. This can be accomplished as soon as the employee can determine earned income, income tax filing status, covered taxable reimbursements for year 1 and the applicable marginal tax rates.

In compliance with Privacy Act of 1974 the following information is provided; Solicitation of the information on this form is authorized by 5 U.S.C. Chapter 57 as implemented by the Federal Travel Regulations (FPMR101-7), E.O. 11609 of July 22, 1971, E.O. 11012 of March 27, 1962, and E.O. 9397 of November 22, 1943. The primary purpose of the information is to facilitate the review, approval, accounting and payment of funds for travel and certain relocation allowance expenses to be incurred under appropriate administrative authorization. The requested information will be used by officers and employees of this agency who have a need for such information in the performance of their official duties. The information will be disclosed to appropriate Federal, State, local or foreign agencies, when relevant to civil, criminal or regulatory investigations or prosecutions, or when pursuant to a requirement by this agency in connection with the hiring or firing of an employee, security clearances, or other investigations of the performance of official duty while in Government service. Disclosure of the requested information is voluntary; however, failure to provide the information required may result in delay or suspension relocation income tax allowance request.

3. Signature:

4 Date: