

### Instructions for Completing the Composite Election Form

#### Section I – Equity Owner(s)

We’ve prepopulated the form with your equity ownership. If this selection needs to be modified, please notify the Dimensional Tax team at [Advisortax@dimensional.com](mailto:Advisortax@dimensional.com).

**Section I**

\* Denotes a required field

Equity Owner(s) of: ⓘ

Dimensional Fund Advisors LP (“DFA LP”)     Dimensional Holdings Inc. (“DHI”)     Both

- 1. **Name of Equity Owner** - Please enter the full name of the equity owner here.
- 2. **Select the equity owner type**- select the option that applies to the equity owner you’ve entered under step 1.

Name of Equity Owner \*

Please indicate the equity owner type: \* ⓘ

- 3. **Equity Owner is a US citizen**- please select “Yes” or “No” based on equity owner’s citizenship.
- 4. **Enter the Tax ID of the Equity Owner**- please input the equity owner’s social security number or other U.S. Tax ID number in either XXX-XX-XXXX or XX-XXXXXXX format.

**\*Please Note\*** If the equity owner does not have a US tax ID, input 000-00-0000

Equity Owner is a US citizen: \*


Please enter the Tax ID number of the Equity Owner \* ⓘ

*Input the equity owner's SSN or other U.S. Tax ID number in either XXX-XX-XXXX or XX-XXXXXXX format.*

- If you have multiple shares in the entity, please click “Add additional equity owner”. For example, you have equity in the entity as an individual “John Smith” and you also have equity in the entity as a trust “John Smith Grantor Trust est. 2024”.

To enter more than one equity owner, use the “add additional equity owner” button below.

- If you have multiple shares, your composite election form should look like the below.

Name of Equity Owner *	John Smith	Please indicate the equity owner type: * ⓘ	Individual
Equity Owner is a US citizen: *	Yes	Please enter the Tax ID number of the Equity Owner * ⓘ	123-45-6789
<i>Input the equity owner's SSN or other U.S. Tax ID number in either XXX-XX-XXXX or XX-XXXXXXX format.</i>			
<b>To enter more than one equity owner, use the "add additional equity owner " button below.</b>			
			
Name of Equity Owner *	John Smith's Trust	Please indicate the equity owner type: * ⓘ	Grantor Trust
Equity Owner is a US citizen: *	Yes	Please enter the Tax ID number of the Equity Owner * ⓘ	123-45-6789
<i>Input the equity owner's SSN or other U.S. Tax ID number in either XXX-XX-XXXX or XX-XXXXXXX format.</i>			

**5. Place(s) of Residence-** Please select the equity owner’s place or places of residence for 2024.

- **\*Please Note\*** If the equity owner had more than one residency for 2024, please click “Add additional place of residency”. For example, if the equity owner was a partial year resident of Texas and California for 2024, the equity owner would enter both places of residency.

**Place(s) of Residence**  
Please indicate the equity owner's place of residence during the 2022 calendar year.

Please select the US state of residency during this year: \*  
Texas

If a non-US resident, please select your country of residence:  
Please select

*If the equity owner had more than one residence for 2022, please click "Add additional place of residency".*

[Add additional place of residency](#)

**Place(s) of Residence**  
Please indicate the equity owner's place of residence during the 2022 calendar year.

Please select the US state of residency during this year: \*  
Texas

If a non-US resident, please select your country of residence:  
Please select

*If the equity owner had more than one residence for 2022, please click "Add additional place of residency".*

Please select the US state of residency during this year: \*  
California

If a non-US resident, please select your country of residence:  
Please select

*If the equity owner had more than one residence for 2022, please click "Add additional place of residency".*

[Add additional place of residency](#)

- If the equity owner is a Non-US Resident for 2024, you will select that option under the US state of residency and select your country of residence instead.

**Place(s) of Residence**  
Please indicate the equity owner's place of residence during the 2022 calendar year.

Please select the US state of residency during this year: \*  
Non-US Resident

If a non-US resident, please select your country of residence: \*  
Australia

*If the equity owner had more than one residence for 2022, please click "Add additional place of residency".*

[Add additional place of residency](#)

**Section II- 2024 State Elections**

Please review the conditions to determine equity owner(s) eligibility before making a composite state tax return election. If you need assistance in making that determination, please consult your tax advisor.

**\*Please Note \*** Unless otherwise indicated, the state elections you make will apply to each equity owner listed under Section I. Certain state selections may not be offered based on the information provided under Section I.

- 1. **State Elections-** please select the state(s) for which the equity owner(s) elects to participate in the composite tax filing. If you do not want to make any state selections, please select "NONE".

*Unless otherwise indicated, the state elections you make will apply to each equity owner listed under Section I. Certain state selections may not be offered based on the information provided under Section I.*

Please select the state(s) for which the equity owner(s) elects to participate in the composite tax filing.

- California
- Georgia
- Maryland\*
- Massachusetts
- Michigan
- Minnesota
- Missouri\*\*\*
- New Jersey
- New York
- North Carolina\*\*
- Ohio
- Oregon
- Pennsylvania\*
- Virginia
- Wisconsin\*
- NONE

\*If the equity owner(s) owns both DFA LP and DHI, they are not eligible to participate in the composite filings for **Maryland, Pennsylvania** and **Wisconsin**.

\*\***North Carolina** does not offer a composite tax filing for DFA LP.

\*\*\*If equity owner(s) owns DHI and is a non-resident of **Missouri** not electing into the composite return, please complete and upload MO 3NR form in the next section.

**Section III - Print View**

- 1. Please use the print preview tab to review the equity owner(s) 2024 composite state tax return election form before proceeding to the Section V for signature and submission. If you need to make any edits, revisit the previous sections accordingly.

**Section IV – Signature**

- 1. Please enter the name and title, if applicable, of the authorized signatory for the equity owner(s) listed under Section I.
- 2. Click “Select to sign” to provide your digital signature.
- 3. A PDF copy of your form should be sent to the e-mail provided shortly after completing the form.

**2024 Composite State Tax Return Election Form**




Name of Authorized Signatory \*

Title of Authorized Signatory

DFA LP Equity Owners Only

I give Dimensional Fund Advisors LP (the “Company”) my power of attorney to include me in a composite return of the Company for the taxable year ending December 31, 2024, to resolve any issues of any tax liability relating thereto, to hold discussions and negotiations with tax advisors and tax authorities, and to make submissions and filings on my behalf, and I authorize the Company to agree to any settlement of income tax liabilities, make any income tax payments, and receive any income tax refunds related to said composite returns. Although all information relating to my tax matters may be disclosed to any officer of the Company, the contact person at the Company with respect to this power of attorney is Bernard J. Grzelak.

*Required \**



Authorized Signature

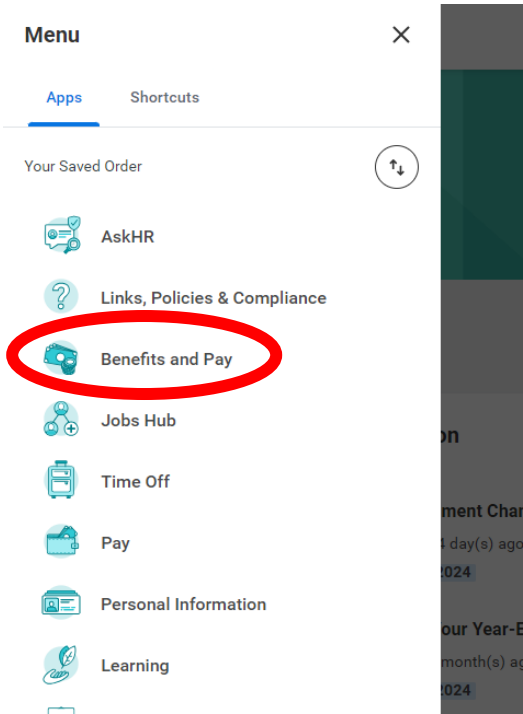
Email Address: \*

Date

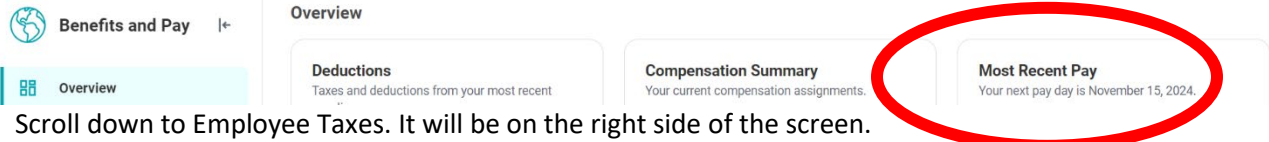
*A copy of your submission will be sent to this email address.*

### How to Find Your State Wage Withholding in Workday

- 1. Go to your Workday homepage
- 2. Click Menu on the left-hand side and select "Benefits and Pay"



- 3. Select Most Recent Pay



- 4. Scroll down to Employee Taxes. It will be on the right side of the screen.

Employee Taxes 10 items

Description	Amount	YTD
OASDI	739.59	9,774.71
Medicare	172.97	2,286.02
Federal Withholding	1,395.33	19,936.03
State Tax - CA	39.17	649.61
State Tax - CA	635.54	9,048.45
State Tax - MO		110.00
State Tax - NC		28.00
State Tax - OR	93.00	949.00
CA SDI - CASDI	133.40	1,760.40