How to Read Your Form 1099-R

This is the gross amount of pension paid to you.

This is the amount of Federal tax withheld from your gross amount.

This is the amount that is taxable and should be reported on your Federal tax return.

9898 ☐ VOID ☐ CORRECTED

PAYER'S name, street address, city, state, and ZIP code	**1** Gross distribution $	OMB No. 1545-0119 **20XX** Form **1099-R**	**Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**
	2a Taxable amount $		
	2b Taxable amount not determined ☐	Total distribution ☐	**Copy A For Internal Revenue Service Center**
PAYER'S federal identification number / RECIPIENT'S identification number	**3** Capital gain (included in box 2a) $	**4** Federal income tax withheld $	**File with Form 1096.**
RECIPIENT'S name	**5** Employee contributions /Designated Roth contributions or insurance premiums $	**6** Net unrealized appreciation in employer's securities $	For Privacy Act and Paperwork Reduction Act Notice, see the **20XX General Instructions for Certain Information Returns.**
Street address (including apt. no.)	**7** Distribution code(s) IRA/ SEP/ SIMPLE ☐	**8** Other $ %	
City, state, and ZIP code	**9a** Your percentage of total distribution %	**9b** Total employee contributions $	
1st year of desig. Roth contrib.	**10** State tax withheld $ $	**11** State/Payer's state no.	**12** State distribution $ $
Account number (see instructions)	**13** Local tax withheld $ $	**14** Name of locality	**15** Local distribution $ $

Form **1099-R**   Cat. No. 14436Q   Department of the Treasury - Internal Revenue Service

Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page

This is the portion of the gross amount that had been taxed previously.

The code number(s) listed identify the type(s) of distribution you received.

> **1 - Early distribution, no known exception (in most cases, under 59$\frac{1}{2}$);**
> **2 - Early distribution, exception applies (under 59$\frac{1}{2}$);**
> **3 - Disability;**
> **4 - Death**
> **7 - Normal**