

# How to Read Your Form 1099R

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	
		\$		<div style="font-size: 2em; font-weight: bold;">20XX</div> <div style="font-weight: bold;">Form 1099-R</div>	
PAYER'S federal identification number		2a Taxable amount			
		\$			
RECIPIENT'S name		2b Taxable amount not determined <input type="checkbox"/>		Total distribution <input type="checkbox"/>	
RECIPIENT'S identification number		3 Capital gain (included in box 2a)		4 Federal income tax withheld	
		\$		\$	
Street address (including apt. no.)		5 Employee contributions / Designated Roth contributions or insurance premiums		6 Net unrealized appreciation in employer's securities	
		\$		\$	
City, state, and ZIP code		7 Distribution code(s)		8 Other	
				\$ %	
		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.	
		\$			
		\$			
Account number (see instructions)		13 Local tax withheld		14 Name of locality	
		\$			
		\$			
		\$			

**Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

**Copy A For Internal Revenue Service Center**

File with Form 1096.

For Privacy Act and Paperwork Reduction Act Notice, see the **20XX General Instructions for Certain Information Returns.**

Form 1099-R

Cat. No. 14436Q

Department of the Treasury - Internal Revenue Service

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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 591/2);
- 2 - Early distribution, exception applies (under 591/2);
- 3 - Disability;
- 4 - Death
- 7 - Normal