

CORRECTED (if checked)

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

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|---|---|---|--|---|---|
| PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Tax Form Issuer, Inc 12021 Sunset Valley Dr Suite 230 Preston, VA 20191 888-555-1212 | | 1 Gross distribution \$ 100000.00 | OMB No. 1545-0119 2022 Form 1099-R | | Copy C For Recipient's Records |
| PAYER'S TIN 12-3456789 | | 2a Taxable amount \$ 21000.00 | 2b Taxable amount not determined <input type="checkbox"/> Total distribution <input checked="" type="checkbox"/> | | |
| RECIPIENT'S TIN xxx-xx-1234 | | 3 Capital gain (included in box 2a) \$ 3000.00 | 4 Federal income tax withheld \$ 4000.00 | | This information is being furnished to the IRS. |
| RECIPIENT'S name Kris Q Public Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121 | | 5 Employee contributions/ Designated Roth contributions or insurance premiums \$ 5000.00 | 6 Net unrealized appreciation in employer's securities \$ 6000.00 | | |
| | | 7 Distribution code(s) A | IRA/ SEP/ SIMPLE <input checked="" type="checkbox"/> | 8 Other \$ % | |
| | | 9a Your percentage of total distribution % | 9b Total employee contributions \$ 9200.00 | | |
| 10 Amount allocable to IRR within 5 years \$ 1000.00 | 11 1st year of desig. Roth contrib. 2012 | 12 FATCA filing requirement <input type="checkbox"/> | 14 State tax withheld \$ 1400.00 | 15 State/Payer's state no. NY/State Id | 16 State distribution \$ 16000.00 |
| Account number (see instructions) 111-23456 | | 13 Date of payment 04/01/2020 | 17 Local tax withheld \$ | 18 Name of locality | 19 Local distribution \$ |

Form **1099-R**

(keep for your records)

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:

<https://financialdataexchange.org/us-tax>

