

CORRECTED (if checked)

**IRA
Contribution
Information**

Copy B

**For
Participant**

This information
is being
furnished to
the IRS.

TRUSTEE'S or ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code Financial Data Exchange 12020 Sunrise Valley Dr Suite 230 Reston, VA 20191 888-555-1212		1 IRA contributions (other than amounts in boxes 2-4, 8-10, 13a, and 14a) \$ 1000.00	OMB No. 1545-0747 2020 (Rev. April 2020) Form 5498	
		2 Rollover contributions \$ 200.00		
		3 Roth IRA conversion amount \$ 300.00	4 Recharacterized contributions \$ 400.00	
TRUSTEE'S or ISSUER'S TIN 12-3456789	PARTICIPANT'S TIN xxx-xx-1234	5 FMV of account \$ 5000.00	6 Life insurance cost included in box 1 \$ 600.00	
PARTICIPANT'S name Kris Q Public		7 IRA <input checked="" type="checkbox"/> SEP <input type="checkbox"/> SIMPLE <input type="checkbox"/> Roth IRA <input type="checkbox"/>		
		8 SEP contributions \$ 800.00	9 SIMPLE contributions \$ 900.00	
Street address (including apt. no.) 1 Main St		10 Roth IRA contributions \$ 1000.00	11 If checked, required minimum distribution for 2021 <input checked="" type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121		12a RMD date 04/01/2020	12b RMD amount \$ 1220.00	
		13a Postponed/late contrib. \$ 1310.00	13b Year 2017	13c Code P
		14a Repayments \$ 141.00	14b Code A	
Account number (see instructions) 12-3456789		15a FMV of certain specified assets \$ 151.00	15b Code(s) B	

Form **5498** (Rev. April 2020)

(keep for your records)

www.irs.gov/Form5498

Department of the Treasury - Internal Revenue Service

Financial Data Exchange
12020 Sunrise Valley Dr
Suite 230
Reston, VA 20191

Kris Q Public
1 Main St
Melrose, NY 12121

