

Data entered from your Form 1099-R

Corrected

Payer

Payer's phone

Payer's TIN

Recipient

Recipient's TIN

1 Gross distribution

2a Taxable amount

2b Taxable amount not
determined

2b Total distribution

3 Capital gain (included in
box 2a)

4 Federal income tax
withheld

5 Employee contributions/
Designated Roth
contributions or insurance
premiums

6 Net unrealized
appreciation in employer's
securities

7 Distribution code(s)

7 IRA/SEP/SIMPLE

8 Other

\$

%

9a Your percentage of
total distributions

9b Total employee
contributions

10 Amount allocable to
IRR within 5 years

11 First year of desig.
Roth contributions

12 FATCA filing
requirement

Account number

13 Date of payment

14 State tax withheld

15 State/Payer's state
no.

16 State distribution

17 Local tax withheld

18 Name of locality

19 Local distribution