

☐ CORRECTED (if checked)

ISSUER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212		ISSUER'S TIN 12-3456789		OMB No. 1545-2234 Form 1098-Q (Rev. December 2019)		Qualifying Longevity Annuity Contract Information
		PARTICIPANT'S TIN xxx-xx-1234				
		1a Annuity amount on start date \$ 8000.00		For calendar year 20 23		
		1b Annuity start date 07/01/2022		2 If checked, start date may be accelerated <input checked="" type="checkbox"/>		Copy B For Participant This information is being furnished to the IRS.
		3 Total premiums \$ 35000.00		4 FMV of QLAC \$ 48000.00		
PARTICIPANT'S name Kris Q Public		5a January \$ 400.00		5b February \$ 400.00		
		5c March \$ 400.00		5d April \$ 400.00		
Street address (including apt. no.) 1 Main St		5e May \$ 400.00		5f June \$ 400.00		
		5g July \$ 400.00		5h August \$ 400.00		
City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121		5i September \$ 400.00		5j October \$ 400.00		
		5k November \$ 400.00		5l December \$ 400.00		
Account number (see instructions) 111-55555555		Plan number 760-4517				
Name of plan AAA QLAC Plans 4		Plan sponsor's EIN 44-12345467				

Form **1098-Q** (Rev. 12-2019)

(Keep for your records)

www.irs.gov/Form1098Q

Department of the Treasury - Internal Revenue Service

Financial Intelligence Associates
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Suite 230
Reston, VA 20191

Kris Q Public
1 Main St
Melrose, NY 12121

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>

