

☐ CORRECTED (if checked)

PAYER'S/TRUSTEE'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		1 Gross distribution \$ 10000.00	OMB No. 1545-1760 Form 1099-Q (Rev. November 2019) For calendar year 20 23	Payments From Qualified Education Programs (Under Sections 529 and 530) Copy B For Recipient This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
		2 Earnings \$ 2000.00		
PAYER'S/TRUSTEE'S TIN 12-3456789	RECIPIENT'S TIN xxx-xx-1234	3 Basis \$ 3000.00	4 Trustee-to-trustee transfer <input checked="" type="checkbox"/>	
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 Distribution is from: • Qualified tuition program — Private <input checked="" type="checkbox"/> or State <input type="checkbox"/> • Coverdell ESA <input type="checkbox"/> If the fair market value (FMV) is shown below, see Pub. 970, Tax Benefits for Education, for how to figure earnings.	6 If this box is checked, the recipient is not the designated beneficiary <input checked="" type="checkbox"/>	
Account number (see instructions) 111-55555555				

Form **1099-Q** (Rev. 11-2019) (keep for your records)

www.irs.gov/Form1099Q

Department of the Treasury - Internal Revenue Service

Financial Intelligence Associates
 12022 Sundown Valley Dr
 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>

