

☐ CORRECTED (if checked)

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|--|--|--|---|---|---|---|--|---|--|
| PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Marks and Sons 31547 Ryan Junction Ferryville, NE 23785 555-867-5309 | | | 1 Gross distribution \$ 400.00 | | OMB No. 1545-0119 2025 | | Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. | | |
| | | | 2a Taxable amount \$ 500.00 | | Form 1099-R | | | | |
| | | | 2b Taxable amount not determined <input checked="" type="checkbox"/> | | Total distribution <input checked="" type="checkbox"/> | | | | |
| PAYER'S TIN 00-0786521 | | RECIPIENT'S TIN 000-68-0798 | | 3 Capital gain (included in box 2a) \$ 600.00 | | 4 Federal income tax withheld \$ 700.00 | | Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the IRS. | |
| RECIPIENT'S name Alvera Hoeger Street address (including apt. no.) 91021 Moen Ville City or town, state or province, country, and ZIP or foreign postal code Larryshire, MI 85447 | | | | 5 Employee contributions/ Designated Roth contributions or insurance premiums \$ 800.00 | | 6 Net unrealized appreciation in employer's securities \$ 900.00 | | | |
| | | | | 7 Distribution code(s) | | IRA/ SEP/ SIMPLE <input checked="" type="checkbox"/> | 8 Other \$ 1000.00 1100.0 % | | |
| | | | | 9a Your percentage of total distribution 1200.0 % | | 9b Total employee contributions \$ 1300.00 | | | |
| 10 Amount allocable to IRR within 5 years \$ 200.00 | | 11 1st year of desig. Roth contrib. 300 | | 12 FATCA filing requirement <input checked="" type="checkbox"/> | | 14 State tax withheld \$ 1400.00 | | | 15 State/Payer's state no. AA/72-691727 |
| Account number (see instructions) recipientAccountNumber | | | | 13 Date of payment 09/14/2025 | | 17 Local tax withheld \$ 1600.00 | | 18 Name of locality Mullermouth | 19 Local distribution \$ 1700.00 |

Form 1099-R

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service