

☐ CORRECTED (if checked)

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|--|------------------------------------|---|--------------------------------|---|
| 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 | | 1 Investment in contract | OMB No. 1545-2281 | Seller's Investment in Life Insurance Contract |
| | | \$ 60000.00 | Form 1099-SB | |
| | | 2 Surrender amount | (Rev. December 2019) | |
| | | \$ 45000.00 | For calendar year 20 22 | |
| ISSUER'S TIN 12-3456789 | SELLER'S TIN xxx-xx-1234 | Issuer's information contact name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. (if different from ISSUER) Kris Q Public 1 Main St Melrose, NY 12121 | | Copy B For Seller 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 item is required to be reported and the IRS determines that it has not been reported. |
| SELLER'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 | | | | |
| Policy number 987-65-4321 | | | | |

Form **1099-SB** (Rev. 12-2019)

(keep for your records)

www.irs.gov/Form1099SB

Department of the Treasury - Internal Revenue Service

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>

