

Form 1099-R CORRECTED (if checked) OMB No. 1545-0119 **2021**

1 Gross distribution **2a** Taxable amount
 \$ _____ \$ _____
Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

2b Taxable amount not determined **Total** distribution **12** FATCA Filing requirement **13** Date of payment
 _____ _____ _____ _____

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.

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PAYER'S TIN _____ RECIPIENT'S TIN _____

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) **IRA/SEP/SIMPLE** **8** Other _____ %
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9a Your percentage of total distribution **9b** Total employee contributions
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Account number (see instructions) **11** 1st year of desig. Roth contrib. **10** Amount allocable to IRR within 5 years
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14 State tax withheld **15** State/Payer's state no. **16** State distribution
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17 Local tax withheld **18** Name of Locality **19** Local distribution
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To complete Form 1099-R, use:

- The 2021 General Instructions for Certain Information Returns, and
- The 2021 Instructions for Forms 1099-R and 5498.

To order these instructions and additional forms, go to www.irs.gov/Form1099R.

Caution: Because paper forms are scanned during processing, you cannot file Forms 1096, 1097, 1098, 1099, 3921, or 5498 that you print from the IRS website.

Due dates. Furnish Copies B, C, and 2 of this form to the recipient by January 31, 2022.

File Copy A of this form with the IRS by February 28, 2022. If you file electronically, the due date is March 31, 2022. To file electronically, you must have software that generates a file according to the specifications in Pub. 1220. The IRS does not provide a fill-in form option for Copy A.

Need help? If you have questions about reporting on Form 1099-R, call the information reporting customer service site toll free at 866-455-7438 or 304-263-8700 (not toll free). Persons with a hearing or speech disability with access to TTY/TDD equipment can call 304-579-4827 (not toll free).

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