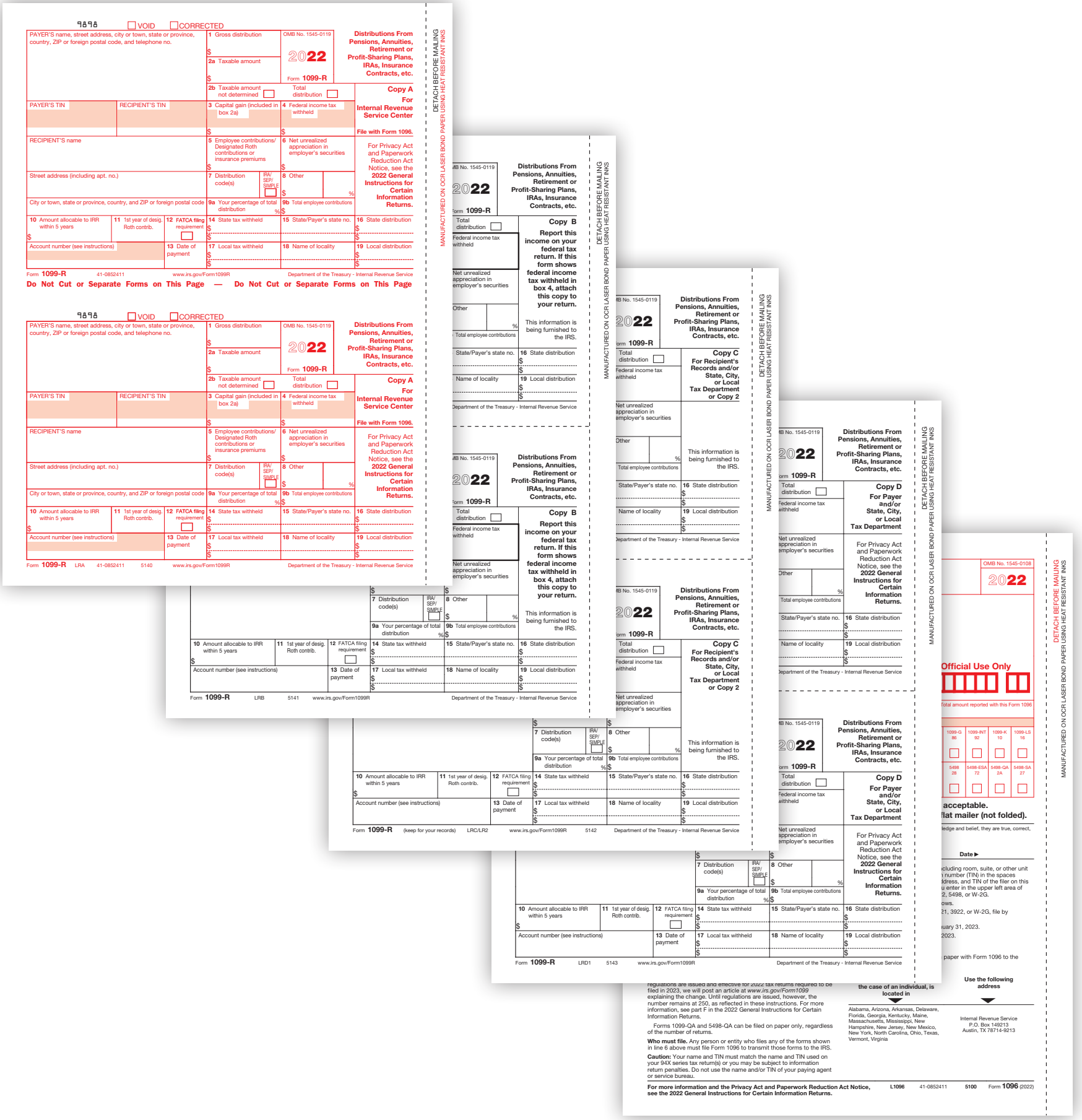

9898 ☐ VOID ☐ CORRECTED

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

1 Gross distribution $

2a Taxable amount $

2b Taxable amount not determined ☐ Total distribution ☐

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 $ %

9a Your percentage of total distribution %

9b Total employee contributions $

10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

13 Date of payment

14 State tax withheld $

15 State/Payer's state no.

16 State distribution $

17 Local tax withheld $

18 Name of locality

19 Local distribution $

PAYER'S TIN | RECIPIENT'S TIN | RECIPIENT'S name | Street address (including apt. no.) | City or town, state or province, country, and ZIP or foreign postal code | Account number (see instructions)

OMB No. 1545-0119 **2022** Form **1099-R**

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Copy A For Internal Revenue Service Center

File with Form 1096.

For Privacy Act and Paperwork Reduction Act Notice, see the **2022 General Instructions for Certain Information Returns.**

Form **1099-R** 41-0852411 www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

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Form **1099-R** LRA 41-0852411 5140 www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

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OMB No. 1545-0119 **2022** Form **1099-R**

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

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.

Total distribution ☐ | Federal income tax withheld | Net unrealized appreciation in employer's securities | Other % | Total employee contributions | State/Payer's state no. | 16 State distribution | Name of locality | 19 Local distribution

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Copy C For Recipient's Records and/or State, City, or Local Tax Department or Copy 2

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Department of the Treasury - Internal Revenue Service

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OMB No. 1545-0108 **2022**

Official Use Only

Total amount reported with this Form 1096

1099-G 86 | 1099-INT 92 | 1099-K 10 | 1099-LS 16 | 5498 28 | 5498-ESA 72 | 5498-QA 2A | 5498-SA 27

acceptable.

flat mailer (not folded).

ledge and belief, they are true, correct,

Date ▶

including room, suite, or other unit number (TIN) in the spaces address, and TIN of the filer on this u enter in the upper left area of 2, 5498, or W-2G.

ows.

21, 3922, or W-2G, file by

uary 31, 2023.

2023.

paper with Form 1096 to the

regulations are issued and effective for 2022 tax returns required to be filed in 2023, we will post an article at *www.irs.gov/Form1099* explaining the change. Until regulations are issued, however, the number remains at 250, as reflected in these instructions. For more information, see part F in the 2022 General Instructions for Certain Information Returns.

Forms 1099-QA and 5498-QA can be filed on paper only, regardless of the number of returns.

Who must file. Any person or entity who files any of the forms shown in line 6 above must file Form 1096 to transmit those forms to the IRS.

Caution: Your name and TIN must match the name and TIN used on your 94X series tax return(s) or you may be subject to information return penalties. Do not use the name and/or TIN of your paying agent or service bureau.

Use the following address

the case of an individual, is located in

Alabama, Arizona, Arkansas, Delaware, Florida, Georgia, Kentucky, Maine, Massachusetts, Mississippi, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Ohio, Texas, Vermont, Virginia

Internal Revenue Service P.O. Box 149213 Austin, TX 78714-9213

For more information and the Privacy Act and Paperwork Reduction Act Notice, see the 2022 General Instructions for Certain Information Returns. L1096 41-0852411 5100 Form **1096** (2022)

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