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 ☐

OMB No. 1545-0119 2022 Form 1099-R

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

PAYER'S TIN | RECIPIENT'S TIN

3 Capital gain (included in box 2a) $

4 Federal income tax withheld $

Copy A For Internal Revenue Service Center

File with Form 1096.

RECIPIENT'S name

5 Employee contributions/ Designated Roth contributions or insurance premiums $

6 Net unrealized appreciation in employer's securities $

Street address (including apt. no.)

7 Distribution code(s) IRA/ SEP/ SIMPLE ☐

8 Other $ %

City or town, state or province, country, and ZIP or foreign postal code

9a Your percentage of total distribution %

9b Total employee contributions $

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

10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

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

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MANUFACTURED ON OCR LASER BOND PAPER USING HEAT RESISTANT INKS

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 ☐

OMB No. 1545-0119 2022 Form 1099-R

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

PAYER'S TIN | RECIPIENT'S TIN

3 Capital gain (included in box 2a) $

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File with Form 1096.

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5 Employee contributions/ Designated Roth contributions or insurance premiums $

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Street address (including apt. no.)

7 Distribution code(s) IRA/ SEP/ SIMPLE ☐

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10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

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.

Total distribution ☐

Federal income tax withheld

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.

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

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.

Total distribution ☐

Federal income tax withheld

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.

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 ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

Form **1099-R** LRB 5141 www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

OMB No. 1545-0119 2022 Form 1099-R

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

Total distribution ☐

Federal income tax withheld

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

Net unrealized appreciation in employer's securities

Other %

Total employee contributions

This information is being furnished to the IRS.

State/Payer's state no. 16 State distribution

Name of locality 19 Local distribution

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.

Total distribution ☐

Federal income tax withheld

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

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 ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

Form **1099-R** (keep for your records) LRC/LR2 www.irs.gov/Form1099R 5142 Department of the Treasury - Internal Revenue Service

OMB No. 1545-0119 2022 Form 1099-R

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

Total distribution ☐

Federal income tax withheld

Copy D For Payer and/or State, City, or Local Tax Department

Net unrealized appreciation in employer's securities

Other %

Total employee contributions

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

State/Payer's state no. 16 State distribution

Name of locality 19 Local distribution

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.

Total distribution ☐

Federal income tax withheld

Copy D For Payer and/or State, City, or Local Tax Department

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 $

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

10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

Form **1099-R** LRD1 5143 www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

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.

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Date ▶

cluding room, suite, or other unit

number (TIN) in the spaces

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2, 5498, or W-2G.

ows.

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

uary 31, 2023.

2023.

paper with Form 1096 to the

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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.

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

Use the following address

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)