

## Pension, Annuities, Retirement, Etc. Distributions

Please attach all 1099-R(s), SSA statements, etc.

<b>Name:</b>		<b>SSN:</b>				
TS	Payer's name:				Payer's Federal ID Number:	
Address:		City:				
<b>U.S. Only</b>	State, Zip					
<b>Foreign Only</b>	Province/State, Country, Postal Code				<b>2013</b>	<b>2012</b>
	<b>2013</b>	<b>2012</b>	State		State I.D.	
Disability indicator	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld			
Report as wages on 1040	<input type="checkbox"/>	<input type="checkbox"/>	State distribution			
Gross distribution			Name of locality			
Taxable amount			Local income tax withheld			
Total distribution	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution			
Capital gain			State		State I.D.	
Federal income tax withheld			State income tax withheld			
Employee contributions or insurance premiums			State distribution			
Distribution code(s)			Name of locality			
IRA/SEP/SIMPLE Roth: Y/N <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld			
Your percentage of total distribution			Local distribution			

TS	Payer's name:				Payer's Federal ID Number:	
Address:		City:				
<b>U.S. Only</b>	State, Zip					
<b>Foreign Only</b>	Province/State, Country, Postal Code				<b>2013</b>	<b>2012</b>
	<b>2013</b>	<b>2012</b>	State		State I.D.	
Disability indicator	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld			
Report as wages on 1040	<input type="checkbox"/>	<input type="checkbox"/>	State distribution			
Gross distribution			Name of locality			
Taxable amount			Local income tax withheld			
Total distribution	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution			
Capital gain			State		State I.D.	
Federal income tax withheld			State income tax withheld			
Employee contributions or insurance premiums			State distribution			
Distribution code(s)			Name of locality			
IRA/SEP/SIMPLE Roth: Y/N <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld			
Your percentage of total distribution			Local distribution			