1099-R Retirement Income IRA/SEP/401(k)/Pension Attach 1099-Rs and 5498s

PLEASE DO NOT ENTER DATA/INFORMATION IN SHADED AREAS

Taxpayer & Spouse:

Did you take RMD in 2021 and recontribute any portion of it in 2023? Yes ☐ No ☐ If yes, amount recontributed: $

Payer	(T) (S)	Gross Distribution	Taxable Amount	TAX NOT DET	TOTAL DISTRIB	Capital Gains	Federal Tax W/H	Employee Contribution Roth Contrib	NUA	Dis-Trib Code	Rollover Y/N	IRA/ SEP	State Tax W/H	Payer's state
		Box 1	Box 2A	Box 2B		Box 3	Box 4	Box 5	Box 6	Box 7 *		Box 7 X	Box 14	Box 15