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

Taxpayer & Spouse:

Did you take RMD in 2021 and recontribute any portion of it in 2023?						No			If yes, amount recontributed: \$					
							5		n yes, amount i	ccontribt				
Payer	(T) (S)	Gross Distribution Box 1	TaxableAmountBox 2A	TAX NOT DET BOX	TOTAL DISTRIB	Capital Gains Box 3	Federal Tax W/H Box 4	Contribution	NUA Box 6	Dis- Trib Code Box 7 *	Rollover Y/N	IRA/ SEP Box 7	State Tax W/H Box 14	Payer's state Box 15
										•		X		
Total T Total S		_				Tota	<u> </u>	_	_				_	
			_	-										
Grand Total				-										
Gran				1			ידויאי ע ום	ים ועועוסטר						
IRA:		-	-		 CODE 1 IS AN EARLY WITHDRAWAL PENALTY. HOWEVER, THERE ARE EXCEPTIONS. PLEASE TELL US WHY YOU TOOK THIS DISTRIBUTION. 									
Pensions:		-	_											
NY/FED Govt Pe (included abov]										

PLEASE DO NOT ENTER DATA/INFORMATION IN SHADED AREAS

