

Pension, Annuities, Retirement, Etc. Distributions

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

Name:				SSN:			
TS				Payer's name:			
				Payer's Federal ID Number:			
Address:							
City, State, Zip						2011	2010
		2011	2010	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"/>	Local income tax withheld			
Your percentage of total distribution				Local distribution			

TS				Payer's name:			
				Payer's Federal ID Number:			
Address:							
City, State, Zip						2011	2010
		2011	2010	State	State I.D.		
Disability indicator		<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld			
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Gross distribution				Name of locality			
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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"/>	Local income tax withheld			
Your percentage of total distribution				Local distribution			

Social Security Benefit Statement

		2011	2010			2011	2010		
TS	Net benefits			Medicare premiums				Income tax withheld	
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