Form 1099R

<table>
<thead>
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<th>Recipient's identifying number</th>
<th>1 Amount includable as income (Add boxes 2, 3, and 4)</th>
<th>2 Capital gain (For lump-sum distributions only)</th>
<th>3 Ordinary income</th>
<th>4 Premiums paid by trustee or custodian for current insurance</th>
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<tbody>
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<td>5 Employee contributions to profit-sharing or retirement plans</td>
<td>6 Amount of IRA distributions (do not include box 4 amounts)</td>
<td>7 Category of distribution</td>
<td>8 Net unrealized appreciation in employer's securities</td>
<td>9 Other:</td>
</tr>
<tr>
<td>Name ▶</td>
<td>98 □</td>
<td></td>
<td></td>
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Type or print Recipient's name, address, and ZIP code above. (Name must align with arrow)
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<td>$</td>
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This does not qualify as a lump-sum distribution.

Your percentage of total distribution. %

Death benefit exclusion does or does not apply.

For instructions on completing this form, see "Instructions for Form 1096."

This information is being furnished to the Internal Revenue Service.

Department of the Treasury—Internal Revenue Service
Notice to Recipients:

These instructions apply to distributions from qualified retirement plans, such as individual retirement accounts (IRAs) and 401(k) plans....

Box 1 - If the distribution constitutes a lump-sum distribution, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash. If a cash distribution is made, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash.

Box 2 - If you receive a distribution from a qualified retirement plan, any payment you receive is taxable. The amount of the taxable portion of the distribution is included in your gross income.

Box 3 - If you elect to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule A of Form 1040 or Form 1040A. If you elect not to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule B of Form 1040 or Form 1040A.

Box 4 - If the distribution constitutes a lump-sum distribution, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash. If a cash distribution is made, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash.

Box 5 - If you receive a distribution from a qualified retirement plan, any payment you receive is taxable. The amount of the taxable portion of the distribution is included in your gross income.

Box 6 - If you elect to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule A of Form 1040 or Form 1040A. If you elect not to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule B of Form 1040 or Form 1040A.

Box 7 - If the distribution constitutes a lump-sum distribution, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash. If a cash distribution is made, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash.

Box 8 - If you receive a distribution from a qualified retirement plan, any payment you receive is taxable. The amount of the taxable portion of the distribution is included in your gross income.

Box 9 - If you elect to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule A of Form 1040 or Form 1040A. If you elect not to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule B of Form 1040 or Form 1040A.

Box 10 - If the distribution constitutes a lump-sum distribution, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash. If a cash distribution is made, the term "lump-sum distribution" means the distribution or payment of all or any part of the retirement plan's balance at the time of distribution in a single, lump-sum payment in cash.

Box 11 - If you receive a distribution from a qualified retirement plan, any payment you receive is taxable. The amount of the taxable portion of the distribution is included in your gross income.

Box 12 - If you elect to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule A of Form 1040 or Form 1040A. If you elect not to take a distribution under the qualified retirement plan, you must report the taxable portion of the distribution on Schedule B of Form 1040 or Form 1040A.
## 1979 Statement for Recipients of Total Distributions from Profit-Sharing, Retirement Plans and Individual Retirement Arrangements

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**For Payer’s Record**

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This does □ does not □ qualify as a lump-sum distribution.

Your percentage of total distribution. ➤% ➤

Death benefit exclusion does □ or does not □ apply.

For instructions on completing this form, see “Instructions for Form 1096.”