

For Official Use Only

Statement for Recipients of **1979** Total Distributions from Profit-Sharing, Retirement Plans and Individual Retirement Arrangements Copy A For Internal Revenue Service Center

Type or print PAYER'S name, address, ZIP code, and Federal identifying number

98

Recipient's identifying number	1 Amount includible as income (Add boxes 2, 3, and 4)	2 Capital gain (For lump-sum distributions only)	3 Ordinary income	4 Premiums paid by trustee or custodian for current insurance
5 Employee contributions to profit-sharing or retirement plans	6 Amount of IRA distributions (do not include box 4 amounts)	7 Category of distribution	8 Net unrealized appreciation in employer's securities	9 Other: \$ _____ %

Name ▶

This does does not qualify as a lump-sum distribution.
Your percentage of total distribution. ▶ _____ %
Death benefit exclusion does or does not apply.

Type or print Recipient's name, address, and ZIP code above. (Name must align with arrow)

For instructions on completing this form, see "Instructions for Form 1099R."

Form 1099R

Department of the Treasury—Internal Revenue Service

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Form 1099R

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Form 1099R

Department of the Treasury—Internal Revenue Service

Statement for Recipients of 1979 Total Distributions from Profit-Sharing, Retirement Plans and Individual Retirement Arrangements Copy B For Recipient

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 Your percentage of total distribution. ▶ %
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 This information is being furnished to the Internal Revenue Service.

Type or print Recipient's name, address, and ZIP code above.

Statement for Recipients of 1979 Total Distributions from Profit-Sharing, Retirement Plans and Individual Retirement Arrangements Copy B For Recipient

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Notice to Recipients:

(Reference is made to the Internal Revenue Code.)

These instructions apply to distributions from profit-sharing and retirement plans, with the exception of boxes 6 and 7 (for individual retirement arrangements) and box 8 which may apply to any distribution.

Lump-sum distributions.—Generally the term "lump-sum distribution" means the distribution or payment from a retirement plan within one taxable year of the retirement, or the failure of the credit of an individual which becomes payable to the recipient (a) on account of death, (b) after attaining age 59½, (c) separation from the service, or (d) becoming disabled (within the meaning of section 72(m)(7)).

If the distribution does not qualify as a lump-sum distribution, you may be eligible for capital gain treatment. The special 10-year averaging method does not apply. In such case, report the total amount of the distribution on Form 1040 under Other Income. For additional information, see Publication 575.

Box 1.—This portion of the lump-sum distribution qualifies for capital gain treatment. Report on Schedule D (Form 1040 or Form 1041) and identify as "Lump-sum Distribution." See Death Benefit Exclusion below. Also see instructions for Form 4972 or 5544 for election to treat this amount as ordinary income for the 10-year averaging method.

Box 2.—This portion of the total distribution is taxable as ordinary income and may be eligible for

a special 10-year averaging method. See Form 4972 or 5544 and instructions for death benefit exclusion below.

NOTE: If there are no entries in boxes 2 and 3, ask the employer to furnish them.

Box 3.—Report this amount on Form 1040 under Other Income as "Premiums paid by trustee or custodian for current life or other insurance."

Box 4.—Amounts contributed or considered contributed by the individual (less nontaxable amounts previously distributed) are not taxable.

NOTE: These boxes are for your IRA distributions.

Box 5.—Amounts you received as distributions from an Individual Retirement Account, Annuity or Bond. These amounts may be includable as income depending on the type of distribution. See Publication 590 for more information.

Box 7.—The number listed here identifies the type of distribution you received from the IRA, as follows:

- 1—Premature Distribution (other than codes 2, 3, 4, or 5); 2—Rollover; 3—Disability; 4—Death; 5—Prohibited Transaction; 6—Other; 7—Normal Distributions; 8—Excess contributions refunded plus earnings on such excess contributions; 9—Transfer to an IRA for a spouse incident to a divorce.

U.S. GOVERNMENT PRINTING OFFICE: 1978—O-283-418 58-040-1-10

Notice to Beneficiaries:

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Box 8.—If the distribution consists of a lump-sum distribution, you may elect to have the appreciated appreciation in the stock until you sell the securities.

Annuity.—If you receive an annuity from a distribution, the annuity is taxable when payments begin to the extent the payments are for the annuity. If the distribution is from a person, the dollar amount of the annuity contract distributed to you. You will need that information for the 10-year averaging method.

Death Benefit Exclusion.—If the distribution is the beneficiary of a decedent (or deceased disabled individual) having retirement annuity or "death benefit exclusion" rights.

Taxable amounts shown in box 2 are out regard to this exclusion. They are between capital gain and ordinary income. The reduced amount of your tax.

NOTE: If the total distribution is for a person, the percentage of the total below one year. Enter the percentage in the Multiple Recipient Special box if elected.

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Box 8.—If the distribution consists of a lump-sum distribution, you may elect to have the appreciated appreciation in the stock until you sell the securities.

Annuity.—If you receive an annuity from a distribution, the annuity is taxable when payments begin to the extent the payments are for the annuity. If the distribution is from a person, the dollar amount of the annuity contract distributed to you. You will need that information for the 10-year averaging method.

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Taxable amounts shown in box 2 are out regard to this exclusion. They are between capital gain and ordinary income. The reduced amount of your tax.

NOTE: If the total distribution is for a person, the percentage of the total below one year. Enter the percentage in the Multiple Recipient Special box if elected.

Statement for Recipients of **1979**
Total Distributions from Profit-Sharing, Retirement Plans and Individual Retirement Arrangements
Copy C
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."

Type or print Recipient's name, address, and ZIP code above.

Form 1099R

Department of the Treasury—Internal Revenue Service

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