

1 Control number 55555		For Official Use Only						
2 Payer's name, address, and ZIP code			3 Payer's Federal identifying number		4 State identifying number			
			5 State income tax withheld			6 Name of State		
			7 TA not determined <input type="checkbox"/>	Deceased <input type="checkbox"/>	Legal rep. <input type="checkbox"/>	Sub-total <input type="checkbox"/>	Correction <input type="checkbox"/>	Void <input type="checkbox"/>
8 Recipient's social security no.		9 Gross annuity, pension, etc.		10 Taxable amount		11 Federal income tax withheld		
12 Recipient's name (first, middle, last)			13			14 IRA code		
15 Recipient's address and ZIP code			Copy A—For Social Security Administration See Instructions for Forms W-2 and W-2P and back of Copy D.					

Form **W-2P 1981**
**Statement for Recipients of Periodic
Annuities, Pensions, Retired Pay, or IRA Payments**
Department of the Treasury
Internal Revenue Service

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Department of the Treasury
Internal Revenue Service

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12 Recipient's name, address, and ZIP code					11 Federal income tax withheld
			13		14 IRA code
			Copy 1—For State, City, or Local Tax Dept. Employee's copy and employer's copy compared <input type="checkbox"/>		

1981

Statement for Recipients of Periodic Annuities, Pensions, Retired Pay, or IRA Payments

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				Copy B—File with recipient's FEDERAL tax return This information is being furnished to the Internal Revenue Service			

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Statement for Recipients of Periodic Annuities, Pensions, Retired Pay, or IRA Payments

Department of the Treasury
Internal Revenue Service

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Form **W-2P 1981**

**Statement for Recipients of Periodic
Annuities, Pensions, Retired Pay, or IRA Payments**

Department of the Treasury
Internal Revenue Service

Notice to Recipient:

If you have nonwage income of more than \$500 and will owe tax of \$100 or more, you should file Form 1040-ES, Declaration of Estimated Tax for Individuals, and pay the tax in installments during the year. You can, instead, have tax withheld from your pension or annuity. To arrange this, please file Form W-4P with the payer.

If the amount shown in box 9 is a payment from an IRA, box 14 has a code number showing the reason for the payment. The code is a four-digit number starting with 666. The fourth digit shows the reason for the payment. The codes are: 1 for premature (other than for disability or death); 2 for rollover; 3 for disability; 4 for death; 6 for other; 7 for normal; 8 for

excess contributions plus earnings on such excess contributions; and 9 for transfer to an IRA for a spouse, incident to divorce.

If there is no entry in box 10, Taxable amount, the payer probably does not have all the facts needed for figuring the taxable amount. Since only the taxable amount is includible in income, you may want to get one of the following publications from an IRS office to help you figure the taxable amount:

Publication 567, Tax Information on U.S. Civil Service Retirement and Disability Retirement;

Publication 571, Tax Sheltered Annuity Programs for Employees of Public Schools and Certain Tax-Exempt Organizations;

Publication 575, Pension and Annuity Income.

☆ U.S. GOVERNMENT PRINTING OFFICE : 1990—O-313-037

313-037-1

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Form **W-2P 1981****Statement for Recipients of Periodic Annuities, Pensions, Retired Pay, or IRA Payments**Department of the Treasury
Internal Revenue Service

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Form **W-2P 1981****Statement for Recipients of Periodic Annuities, Pensions, Retired Pay, or IRA Payments**Department of the Treasury
Internal Revenue Service

Please use this form to report periodic payments under a retirement plan. Examples are pensions, retainer pay, annuities under a purchased contract, and payments from individual retirement accounts or annuities. Payments to retired military persons and some court officials are now reported on Form W-2P instead of on Form W-2, Wage and Tax Statement. See separate **Instructions for Forms W-2 and W-2P** for more information on how to complete Form W-2P.

Use Form W-2 to report payments that are subject to social security (FICA) tax.

You need not file Form W-2P for the following cases: (a) You paid retirement benefits that are exempt from tax. Examples are social security, workmen's compensation, most railroad retirement, and Veterans Administration payments. (b) You made payments as a fiduciary, filed Form 1041, and gave each beneficiary a Schedule K-1 (Form 1041). (c) You made total distributions reported on Form 1099R.

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