

## Pension, Annuities, Retirement, Etc. Distributions

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

<b>Name:</b>	<b>SSN:</b>
--------------	-------------

TS	Payer's name:				Payer's Federal ID Number:
Address:					
City, State, Zip				<b>2011</b>	<b>2010</b>
	<b>2011</b>	<b>2010</b>	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"/>	<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				<b>2011</b>	<b>2010</b>
	<b>2011</b>	<b>2010</b>	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"/>	<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			
TS	Net benefits				Medicare premiums				Income tax withheld			