1099-R Retirement Income IRA/SEP/401(k)/Pension Attach 1099-Rs and 5498s

PLEASE DO NOT ENTER DATA/INFORMATION IN SHADED AREAS

Taxpayer & Spouse:

New Covid-19 Distributions Distribution made from eligible retirement plan [401(k) plan, 403(b) plan, govermental 457(b) plan, or IRA] in 2020, up to **$100,000 per person** from all plans and IRAs. The 10% early-withdrawal penalty **does not** apply for COVID-19 distributions. You are allowed to **recontribute** any portion of the distribution by **12/31/22**. Recontribution may require amending of your 2020 and/or 2021 tax returns.

WHO QUALIFIES	1. A taxpayer who is diagnosed, or whose spouse or dependent is diagnosed with Covid-19 by a test approved by the CDC and/or FDA; or 2. A taxpayer who suffers financial consequences as a result of you, your spouse, or **a member in your household** (someone who shares the taxpayer's principal residence):	a) Being quarantined, furloughed, or laid off, or having work hours reduced due to Covid-19 b) Being unable to work due to lack of childcare due to Covid-19 c) Owning a business that is closed or its hours reduced due to Covid-19 d) Receiving reduced pay or self-employment income due to Covid-19 e) Having a job offer rescinded or start date for a job delayed due to Covid-19

You have the option of: (1) taxing the entire distribution in 2020; OR (2) taxing the distribution spread over a 3-year period, in equal parts. Please choose. ☐ Option 1 ☐ Option 2

Did you recontribute any of this distribution by 12/31/2020? ☐ Yes **Amount recontributed: $** ☐ No

Payer	(T) (S)	Gross Distribution	Taxable Amount	TAX NOT DET	TOTAL DIS-TRUB	Capital Gains	Federal Tax W/H	Employee Contribution Roth Contrib	NUA	Dis-Trib Code	Rollover Y/N	IRA/ SEP	State Tax W/H	Payer's state
		Box 1	Box 2A	Box 2B		Box 3	Box 4	Box 5	Box 6	Box 7		Box 7	Box 14	Box 15
				X						*		X		
Total:														
Total Pensions:														
Total IRA:														
Total Govt Pensions: FED/NYC/NYS														

* CODE 1 IS AN EARLY WITHDRAWAL PENALTY.
HOWEVER, THERE ARE EXCEPTIONS.
PLEASE TELL US WHY YOU TOOK THIS DISTRIBUTION.