

1099-R Amounts

ORG7B

Source From: 1099-R ... ▶ CSA-1099-R ... ▶ CSF-1099-R ... ▶ RRB-1099-R ... ▶



Payer's name

Box Description 2009 2008

Federal income tax withheld

- ▶
▶
▶ Check if a qualified Roth IRA distribution, but box 7 code is J or T, not code Q
▶ If a fully taxable disability pension, check if recipient is under the minimum retirement age

State tax withheld - State 1
State tax withheld - State 2
State/Payer's state number - State 1
State/Payer's state number - State 2
State distribution - State 1
State distribution - State 2
Local tax withheld - Locality 1
Local tax withheld - Locality 2
Name of locality - Locality 1
Name of locality - Locality 2
Local distribution - Locality 1
Local distribution - Locality 2

- Inherited IRA If this distribution is from an inherited IRA, indicate the distribution is from the IRA of
▶ Spouse and treat as recipient's own (treat as rollover)
▶ Recipient, but originally was inherited from spouse's (own IRA)
▶ Spouse and not treat as recipient's own (taxable amount in box 2a)
▶ Someone other than a spouse (taxable amount in box 2a)