

TREASURY/IRS AND OMB USE ONLY DRAFT

☐ CORRECTED (if checked)

PAYER'S name Johns and Sons				1 Gross distribution \$ 200.00		OMB No. 1545-0119 2026		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
Street address 82527 Nathaniel Mill		Room or suite no. 850		2a Taxable amount \$ 300.00		Form 1099-R		
City or town Brandonfort		Telephone number 555-867-5309		2b Taxable amount not determined ☒		Total distribution ☒		
State or province PA		Country		ZIP or foreign postal code 17902		3 Capital gain (included in box 2a) \$ 400.00		
PAYER'S TIN 00-0774115		RECIPIENT'S TIN xxx-xx-2422		4 Federal income tax withheld \$ 500.00		5 Employee contrib./desig. Roth contrib. or insurance premiums \$ 600.00		Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the IRS.
RECIPIENT'S name Nick Stewart Hane				6 NUA in employer's securities \$ 700.00		7a Dist. code(s) A		
Street address 3392 Watsica Rue		Apt. no. 494		7b IRA/SEP/SIMPLE ☒		7c Trump account ☒		
City or town East Tamesha		8a Other \$ 900.00		7d Earnings on excess contrib. \$ 800.00		8b Percentage of annuity contract 0.8 %		
State or province MO		Country		ZIP or foreign postal code 88108		9a Percentage of total dist. 0.11 %		
9b Total employee contrib. \$ 1200.00		10 Amount allocable to IRR within 5 years \$ 1300.00		11 1st year of desig. Roth contrib. 1400		12 FATCA filing requirement ☒		
Account number (see instructions) 410-59944-4				13 Date of payment 07/23/2026		14 State tax withheld \$ 1500.00		
				15 State/Payer's state no. AA/78-337020		16 State distribution \$ 1600.00		
				17 Local tax withheld \$ 1700.00		18 Name of locality West Ashlton		
				19 Local distribution \$ 1800.00				

Form **1099-R**

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service