

Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.
▶ Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return	2 Your social security number
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3 Address _____

4 Enter year in space provided and check one box. For the tax year ending December 31, _____, I have been unable to obtain (or have received an incorrect) Form W-2 **OR** Form 1099-R. I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code	6 Employer's or payer's identification number (if known)
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7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

<p>a Wages, tips, and other compensation _____</p> <p>b Social security wages _____</p> <p>c Medicare wages and tips _____</p> <p>d Social security tips _____</p> <p>e Federal income tax withheld _____</p>	<p>f State income tax withheld _____ (Name of state) _____</p> <p>g Local income tax withheld _____ (Name of locality) _____</p> <p>h Social security tax withheld _____</p> <p>i Medicare tax withheld _____</p>
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8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

<p>a Gross distribution _____</p> <p>b Taxable amount _____</p> <p>c Taxable amount not determined <input type="checkbox"/></p> <p>d Total distribution <input type="checkbox"/></p> <p>e Capital gain (included in line 8b) _____</p>	<p>f Federal income tax withheld _____</p> <p>g State income tax withheld _____</p> <p>h Local income tax withheld _____</p> <p>i Employee contributions _____</p> <p>j Distribution codes _____</p>
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9 How did you determine the amounts on lines 7 and 8 above? _____

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement. _____