



New York State Department of Taxation and Finance

Summary of Federal Form 1099-R Statements

IT-1099-R

New York State • New York City • Yonkers

Do not detach or separate the 1099-R Records below. File Form IT-1099-R as an entire page. See instructions on the back.

Taxpayer's name (individual taxpayer, or estate or trust)	
Spouse's first name and middle initial (if applicable)	Spouse's last name (if applicable)

▼ Taxpayer's ID number (SSN or EIN)

▼ Spouse's social security number

1099-R Record 1

The recipient of this 1099-R is
(mark an X in one box):

Taxpayer ☐Spouse ☐Estate or trust ☐**Box a** Payer's name and full address**Box b** Payer's federal identification number**Box 1** Gross distribution**Box 2a** Taxable amount**Box 2b** Taxable amount not determined.. ☐Total distribution..... ☐**Box 3** Capital gain (included in box 2a)**Box 7** Distribution code(s)**Box 9a** Percentage of distribution**Box 9b** Employee contributions

State

Box 10 State tax withheld (for NY State)

N Y

Box 12 State distribution

NY State

Box 13 Local tax withheld

Locality a

Locality b

Box 14 Locality name

Locality a

Locality b

Box 15 Local distribution

Locality a

Locality b

Corrected (1099-R) ☐**Do not detach.****1099-R Record 2**

The recipient of this 1099-R is
(mark an X in one box):

Taxpayer ☐Spouse ☐Estate or trust ☐**Box a** Payer's name and full address**Box b** Payer's federal identification number**Box 1** Gross distribution**Box 2a** Taxable amount**Box 2b** Taxable amount not determined.. ☐Total distribution..... ☐**Box 3** Capital gain (included in box 2a)**Box 7** Distribution code(s)**Box 9a** Percentage of distribution**Box 9b** Employee contributions

State

Box 10 State tax withheld (for NY State)

N Y

Box 12 State distribution

NY State

Box 13 Local tax withheld

Locality a

Locality b

Box 14 Locality name

Locality a

Locality b

Box 15 Local distribution

Locality a

Locality b

Corrected (1099-R) ☐

Please file this original scannable form with the Tax Department.

If you or your paid preparer use software to produce this form, it might have a two-dimensional (2-D) barcode on the bottom of this page. It will appear as a rectangular-shaped object with very small black boxes and white spaces. This barcode will be used to efficiently process your entries on this form.

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1099-R Record 3The recipient of this 1099-R is
(mark an X in one box):Taxpayer ☐ Spouse ☐ Estate or trust ☐**Box a** Payer's name and full address**Box b** Payer's federal identification number**Box 1** Gross distribution**Box 2a** Taxable amount**Box 2b** Taxable amount not determined.. ☐Total distribution..... ☐**Box 3** Capital gain (included in box 2a)**Box 7** Distribution code(s)**Box 9a** Percentage of distribution**Box 9b** Employee contributionsState **Box 10** State tax withheld (for NY State)

N Y

Box 12 State distributionNY State ☐**Box 13** Local tax withheldLocality a ☐
Locality b ☐**Box 14** Locality nameLocality a ☐
Locality b ☐**Box 15** Local distributionLocality a ☐
Locality b ☐**Corrected (1099-R)** ☐

Do not detach.

1099-R Record 4The recipient of this 1099-R is
(mark an X in one box):Taxpayer ☐ Spouse ☐ Estate or trust ☐**Box a** Payer's name and full address**Box b** Payer's federal identification number**Box 1** Gross distribution**Box 2a** Taxable amount**Box 2b** Taxable amount not determined.. ☐Total distribution..... ☐**Box 3** Capital gain (included in box 2a)**Box 7** Distribution code(s)**Box 9a** Percentage of distribution**Box 9b** Employee contributionsState **Box 10** State tax withheld (for NY State)

N Y

Box 12 State distributionNY State ☐**Box 13** Local tax withheldLocality a ☐
Locality b ☐**Box 14** Locality nameLocality a ☐
Locality b ☐**Box 15** Local distributionLocality a ☐
Locality b ☐**Corrected (1099-R)** ☐**General instructions****Who must file this form** — All filers of New York State income tax returns who received 1099-R statements that show New York State, New York City, or Yonkers withholding, must complete Form IT-1099-R.**How to complete Form IT-1099-R** — Complete one *1099-R Record* section for each federal Form 1099-R you (and if filing jointly, your spouse), or an estate or trust received that shows New York State, New York City, or Yonkers withholding. Enter only the information requested on Form IT-1099-R. Complete additional Form(s) IT-1099-R if necessary.Each box on the *1099-R Record* section corresponds to a numbered box on federal Form 1099-R. Enter the amount, code, or description provided on federal Form 1099-R in the corresponding numbered boxes on the Form IT-1099-R, *1099-R Record*.**Do not detach or separate** the 1099-R Records. File Form IT-1099-R as an entire page. Attach this form (IT-1099-R) to your New York State income tax return, Form IT-150, IT-201, IT-203, or IT-205. Attach additional Forms IT-1099-R ifapplicable. **Do not** attach your federal 1099-R forms; keep them for your records.**Specific instructions**

Enter the taxpayer's name and identification number, and if married, the spouse's name and social security number.

For each *1099-R Record*, mark an **X** in the applicable box to indicate if the 1099-R is for you, your spouse, or an estate or trust. In **Box a** and **Box b**, enter the payer's name and address and the payer's federal identification number as they appear on the corresponding federal Form 1099-R.Mark an **X** in the *Total distribution* box of the *1099-R Record* if the corresponding box on federal Form 1099-R is marked.**Corrected (1099-R)** — If the *1099-R Record* is for a federal corrected Form 1099-R, mark an **X** in the *Corrected (1099-R)* box.

Please file this original scannable form with the Tax Department.

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