

# IRS Form 5498

This form reports contributions and rollovers (not transfers) to your IRA for the reporting year. This form is mailed at the end of May for the previous year, and is not intended to be included with your personal tax filing return. For more complete information about this form and its applications, please refer to [IRS Publication 590](#).

CORRECTED (if checked)

TRUSTEE'S or ISSUER'S name, street address, city, state, and ZIP code 53515213 MG TRUST COMPANY, LLC 700 17TH STREET SUITE 300 DENVER CO 80202		1 IRA contributions (other than amounts in boxes 2-4, 8-10, 13a, and 14a) \$ 2 Rollover contributions \$ 2096.65	OMB No. 1545-0747 <b>2010</b> Form 5498	<b>IRA Contribution Information</b>  <b>Copy B For Participant</b>
TRUSTEE'S or ISSUER'S federal identification no. 75-3182674	PARTICIPANT'S social security number XXX-XX-8634	3 Roth IRA conversion amount \$	4 Recharacterized contributions \$	
TRUSTEE'S or ISSUER'S name, street address, city, state, and ZIP code Jim Sample 1254 E. Main St. Denver CO 80123		5 Fair market value of account \$ 2052.97	6 Life insurance cost included in box 1 \$	This information is being furnished to the Internal Revenue Service.
PARTICIPANT'S name, street address (including apt. no.), city, state, ZIP code Jim Sample 1254 E. Main St. Denver CO 80123		7 IRA <input checked="" type="checkbox"/> SEP <input type="checkbox"/> SIMPLE <input type="checkbox"/> Roth IRA <input type="checkbox"/>	8 SEP contributions \$	
10 Roth IRA contributions \$		9 SIMPLE contributions \$	11 If checked, required minimum distribution for 2011. <input type="checkbox"/>	
12a RMD date \$		12b RMD amount \$	13a Postponed contribution \$	
Account number (see instructions) 10490		13b Year 13c Code	14a Repayments \$	14b Code

Form 5498 (keep for your records) Department of the Treasury - Internal Revenue Service

Account number and custodian for your account (MG Trust)

MG Trust's Tax ID Number; recipient SSN, name and address

**Box 5, Fair Market Value.** The reported value of the balance of your account, as of December 31 of the reporting year.

**Amount of contribution (Box 1-9, depending on type of contribution)**

**Box 7, Type of IRA.** Your MG Trust Safe Harbor Account will either be "IRA" or "Roth IRA"

**Box 11, Required Minimum Distribution (RMD).** If this box is checked, we believe that you are at least 79 1/2 years old, or will reach this age by the end of the current year, and therefore you must take a taxable distribution of at least part of the balance of your account in the current year. Please refer to IRS Publication 590 for more information on this requirement.