



Summary of Federal Form 1099-R Statements

New York State • New York City • Yonkers

IT-1099-R

Recipient's name (individual taxpayer, or estate or trust)

▼ Recipient's ID number (SSN or EIN)

Spouse's first name and middle initial (if applicable)

Spouse's last name (if applicable)

▼ Spouse's social security number

1099-R Record 1

This 1099-R is for (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

Corrected (1099-R)

State

Box 10 State tax withheld (for NY State)

Box 12 State distribution

Box 13 Local tax withheld

Locality a

Locality b

Box 14 Locality name

Locality a

Locality b

Box 15 Local distribution

Locality a

1099-R Record 2

This 1099-R is for (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

Corrected (1099-R)

State

Box 10 State tax withheld (for NY State)

Box 12 State distribution

Box 13 Local tax withheld

Locality a

Locality b

Box 14 Locality name

Locality a

Locality b

Box 15 Local distribution

Locality a

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.



1099-R Record 3

This 1099-R is for (mark an X in one box):

Taxpayer Spouse Estate or trust

Box a Payer's name and full address

[Empty box for Payer's name and full address]

Box b Payer's federal identification number

[Empty box for Payer's federal identification number]

Box 1 Gross distribution

[Empty box for Gross distribution]

Box 2a Taxable amount

[Empty box for Taxable amount]

Box 2b Taxable amount not determined ..

Total distribution

Box 3 Capital gain (included in box 2a)

[Empty box for Capital gain]

Box 7 Distribution code(s)

[Empty box for Distribution code(s)]

Box 9a Percentage of distribution

[Empty box for Percentage of distribution]

Box 9b Employee contributions

[Empty box for Employee contributions]

Corrected (1099-R)

State

N Y

Box 10 State tax withheld (for NY State)

[Empty box for State tax withheld]

Box 12 State distribution

NY State [Empty box for State distribution]

Box 13 Local tax withheld

Locality a [Empty box for Local tax withheld]

Box 14 Locality name

Locality a [Empty box for Locality name]

Box 15 Local distribution

Locality a [Empty box for Local distribution]

1099-R Record 4

This 1099-R is for (mark an X in one box):

Taxpayer Spouse Estate or trust

Box a Payer's name and full address

[Empty box for Payer's name and full address]

Box b Payer's federal identification number

[Empty box for Payer's federal identification number]

Box 1 Gross distribution

[Empty box for Gross distribution]

Box 2a Taxable amount

[Empty box for Taxable amount]

Box 2b Taxable amount not determined ..

Total distribution

Box 3 Capital gain (included in box 2a)

[Empty box for Capital gain]

Box 7 Distribution code(s)

[Empty box for Distribution code(s)]

Box 9a Percentage of distribution

[Empty box for Percentage of distribution]

Box 9b Employee contributions

[Empty box for Employee contributions]

Corrected (1099-R)

State

N Y

Box 10 State tax withheld (for NY State)

[Empty box for State tax withheld]

Box 12 State distribution

NY State [Empty box for State distribution]

Box 13 Local tax withheld

Locality a [Empty box for Local tax withheld]

Box 14 Locality name

Locality a [Empty box for Locality name]

Box 15 Local distribution

Locality a [Empty box for Local distribution]

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. 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*.

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, if applicable. **Do not** attach your federal 1099-R forms; keep them for your records.

Specific instructions

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. Also, mark an **X** in the applicable box to indicate if the 1099-R is for you, your spouse, or an estate or trust.

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.

