

# Summary of Federal Form 1099-R Statements 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.

Name(s) as shown on return			Identi	fying number as shown on return
1099-R Record 1 Recipient's identification number for this 1099-R	Corrected (1099-R)		Box 11	1st year of desig. Roth contrib.
Box A Payer's name and full address				
		State N Y	Box 12	State tax withheld (for NY State)
		IN T	Box 14	State distribution
Box B Payer's federal identification number	Box 3 Capital gain (included in box 2a)	NY State		00 Local tax withheld (NYC or Yonkers
Box 1 Gross distribution	Box 7 Distribution code(s)	Locality a		00
Box 2a Taxable amount	Box 9a Percentage of distribution	Locality b	Boy 16	Locality name
00	•	Locality a		Locality harne
Box 8b Tauchla assessed and determined	Box 9b Employee contributions	Locality b		Local distribution
Box 2b Taxable amount not determined	Box 10 Amount allocable to IRR within 5 years	Locality a		00
Total distribution	00	Locality b		00
Box C Account number				
1099-R Record 2	Corrected (1099-R)			Do not detach
Recipient's identification number for this 1099-R			Box 11	1st year of desig. Roth contrib.
Box A Payer's name and full address		State	Pay 42	State tax withheld (for NY State)
		State N Y	DOX 12	OO OO
			Box 14	State distribution
Box B Payer's federal identification number	Box 3 Capital gain (included in box 2a)	NY State	Box 15	00 Local tax withheld (NYC or Yonkers
Box 1 Gross distribution	Box 7 Distribution code(s)	Locality a		00
00		Locality b		00
Box 2a Taxable amount	Box 9a Percentage of distribution		Box 16	Locality name
00	Box 9b Employee contributions	Locality a		
Box 2b Taxable amount not determined	00	Locality b		Local distribution
Total distribution	Box 10 Amount allocable to IRR within 5 years  00	Locality a Locality b		00
Box C Account number				

1099-R Record 3 Recipient's identification	Corrected (1099-R)			
number for this 1099-R			Box 11 1	st year of desig. Roth contrib.
Box A Payer's name and full address				
		State	<b>Box 12</b> S	state tax withheld (for NY State)
		NY		00
B. B. B. and followill design of the control of the			<b>Box 14</b> S	state distribution
Box B Payer's federal identification number	Box 3 Capital gain (included in box 2a)	NY State		00
	00		Box 15 L	ocal tax withheld (NYC or Yonkers)
Box 1 Gross distribution	Box 7 Distribution code(s)	Locality a		00
00		Locality b		00
Box 2a Taxable amount	Box 9a Percentage of distribution	•	Box 16 L	ocality name
00		Locality a		
	Box 9b Employee contributions	Locality b		
Box 2b Taxable amount not determined	00		Box 17 L	ocal distribution
<del></del>	Box 10 Amount allocable to IRR within 5 years	Locality a		00
Total distribution	00	Locality b		00
Box C Account number				

Do not detach.

# **Instructions**

## **General instructions**

**Who must file this form** – You must complete Form IT-1099-R, if you file a New York State income tax return and you received 1099-R statements that show New York State, New York City, or Yonkers withholding.

### Specific instructions

Enter the name(s) and entire 9-digit social security number (SSN) or employer identification number (EIN) as entered on your income tax return. If you are married filing a joint return, enter both names and the SSN listed first on the return.

Entering whole dollar amounts – When entering amounts, enter whole dollar amounts only (zeros have been preprinted). Use the following rounding rules when entering your amounts; drop amounts below 50 cents and increase amounts from 50 to 99 cents to the next dollar. For example, \$1.39 becomes \$1 and \$2.50 becomes \$3.

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.

#### How to complete each 1099-R Record

Each box in 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 Form IT-1099-R.

Recipient's identification number for this Form 1099-R – Enter your SSN (or your spouse's SSN) or the EIN of the estate or trust, as applicable.

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  $\boldsymbol{X}$  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.

**Transfer** the tax withheld amounts to your income tax return. Include the total NYS tax withheld amounts, the total NYC tax withheld amounts, and the total Yonkers tax withheld amounts from all your Form(s) IT-1099-R as follows:

- NYS tax withheld Include on Form IT-201, line 72; Form IT-203, line 62; or Form IT-205, line 34.
- NYC tax withheld Include on Form IT-201, line 73; Form IT-203, line 63; or Form IT-205, line 35.
- Yonkers tax withheld Include on Form IT-201, line 74; Form IT-203, line 64; or Form IT-205, line 36.

**Do not detach or separate** the 1099-R Records. File Form IT-1099-R as an entire page. Submit this form (IT-1099-R) with your New York State income tax return: Form IT-201, IT-203, or IT-205. Submit additional Form(s) IT-1099-R if applicable.

**Do not** submit your federal 1099-R forms; keep them for your records.

