



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.

Name(s) as shown on return

Identifying number as shown on return

## 1099-R Record 1

Corrected (1099-R)

Recipient's identification number for this 1099-R

Box A Payer's name and full address

Box B Payer's federal identification number

Box 1 Gross distribution

.00

Box 2a Taxable amount

.00

Box 2b Taxable amount not determined

Total distribution

Box 3 Capital gain (included in box 2a)

.00

Box 7 Distribution code(s)

Box 9a Percentage of distribution

.00

Box 9b Employee contributions

.00

Box 10 Amount allocable to IRR within 5 years

.00

Box C Account number

Box 11 1st year of desig. Roth contrib.

State

NY

Box 14 State tax withheld (for NY State)

.00

NY State

Box 16 State distribution

.00

Locality a

Box 17 Local tax withheld (NYC or Yonkers)

.00

Locality b

.00

Locality a

Box 18 Locality name

Locality b

Box 19 Local distribution

Locality a

.00

Locality b

.00

Do not detach.

## 1099-R Record 2

Corrected (1099-R)

Recipient's identification number for this 1099-R

Box A Payer's name and full address

Box B Payer's federal identification number

Box 1 Gross distribution

.00

Box 2a Taxable amount

.00

Box 2b Taxable amount not determined

Total distribution

Box 3 Capital gain (included in box 2a)

.00

Box 7 Distribution code(s)

Box 9a Percentage of distribution

.00

Box 9b Employee contributions

.00

Box 10 Amount allocable to IRR within 5 years

.00

Box C Account number

Box 11 1st year of desig. Roth contrib.

State

NY

Box 14 State tax withheld (for NY State)

.00

NY State

Box 16 State distribution

.00

Locality a

Box 17 Local tax withheld (NYC or Yonkers)

.00

Locality b

.00

Locality a

Box 18 Locality name

Locality b

Box 19 Local distribution

Locality a

.00

Locality b

.00

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1099-R Record 3

Corrected (1099-R)

Recipient's identification number for this 1099-R .....

Box A Payer's name and full address

Box B Payer's federal identification number

Box 1 Gross distribution .00

Box 2a Taxable amount .00

Box 2b Taxable amount not determined

Total distribution.....

Box 3 Capital gain (included in box 2a) .00

Box 7 Distribution code(s)

Box 9a Percentage of distribution

Box 9b Employee contributions .00

Box 10 Amount allocable to IRR within 5 years .00

Box C Account number

Box 11 1st year of desig. Roth contrib.

State NY Box 14 State tax withheld (for NY State) .00

NY State Box 16 State distribution .00

Locality a Box 17 Local tax withheld (NYC or Yonkers) .00

Locality b .00

Locality a Box 18 Locality name

Locality b Box 19 Local distribution .00

Locality b .00

Do not detach.

Instructions

General instructions

Who must file this form

- You must complete Form IT-1099-R if you:
- are required to file a New York State income tax return, and
- received 1099-R statements that show New York State, New York City, or Yonkers withholding.

To learn who must file a New York State income tax return, see Do I need to file an income tax return? (Search: file)

Specific instructions

In the top section of the form, enter your name 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 you listed first on your income tax return.

Entering whole dollar amounts: When you enter amounts on this form, enter whole dollar amounts only (zeros have been preprinted), and use the following rounding rules: 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.

How to complete each 1099-R Record

If you received any federal Forms 1099-R that show New York State, New York City, or Yonkers withholding, complete this form as follows for each:

Individuals: You must complete one 1099-R Record section for each federal Form 1099-R you received.

Married couples: If you are married and filing a joint return, you must also complete one 1099-R Record section for each federal Form 1099-R your spouse received.

Estates or trusts: Complete one 1099-R Record for each federal Form 1099-R the estate or trust received.

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. Enter only the information requested on Form IT-1099-R. Complete additional Form(s) IT-1099-R if necessary.

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

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. If the corresponding box on federal Form 1099-R is marked, mark an X in the Total distribution box of the 1099-R record.

Corrected (1099-R) - If you received a federal corrected Form 1099-R, complete a 1099-R Record and mark an X in the Corrected (1099-R) box.

Transfer the information: After you complete this form, transfer the tax withheld amounts to your income tax return as follows:

NY State tax withheld: Transfer the total amounts you entered in Box 14 from all 1099-R records to: Form IT-201, line 72; Form IT-203, line 62; or Form IT-205, line 34.

NYC tax withheld: Transfer the total amounts you entered for NYC in Box 17 from all 1099-R records to: Form IT-201, line 73; Form IT-203, line 63; or Form IT-205, line 35

Yonkers tax withheld: Transfer the total amounts you entered for Yonkers in Box 17 from all 1099-R records to: Form IT-201, line 74; Form IT-203, line 64; or Form IT-205, line 36.

File Form IT-1099-R as an entire page with your New York State income tax return: Form IT-201, IT-203, or IT-205.

Paper filers: Do not submit your federal 1099-R forms; keep them for your records. Do not detach or separate the 1099-R Records. Submit additional Forms IT-1099-R as needed to complete separate record for each federal Form 1099-R you received showing New York State, New York City, or Yonkers tax withheld.

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