Omaha School Employees' Retirement System
Pension Payments

This information is reported to you and the Internal Revenue Service

Box 1: The sum gross total of all the payments sent to you from OSERS in 2021

Box 2: The sum gross total of all the payments sent to you in 2021 subject to income tax.

Box 5: The sum of distributions paid to you in 2021 that is not subject to tax (you already paid taxes on this money when you were employed)

Hint: Box 1 minus Box 2 = Box 5

Box 7: Distribution Code for your payment …

2 = early retirement distributions (exception applies)

3 = disability payments

4 = distribution due to the death of the account owner

7 = normal distribution

Form **1099-R**

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

1 Gross distribution $

OMB No. 1545-0119

20**21**

Form **1099-R**

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

2a Taxable amount $

2b Taxable amount not determined ☐   Total distribution ☐

Copy B

Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.

PAYER'S TIN   RECIPIENT'S TIN

3 Capital gain (included in box 2a) $

4 Federal income tax withheld $

RECIPIENT'S name

5 Employee contributions/ Designated Roth contributions or insurance premiums $

6 Net unrealized appreciation in employer's securities $

Street address (including apt. no.)

7 Distribution code(s)   IRA/ SEP/ SIMPLE ☐

8 Other $ %

This information is being furnished to the IRS.

City or town, state or province, country, and ZIP or foreign postal code

9a Your percentage of total distribution   %

9b Total employee contributions $

10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

13 Date of payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

Form **1099-R**   www.irs.gov/Form1099R   Department of the Treasury - Internal Revenue Service