

1099-R Form

1099-R Form

VOID CORRECTED

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	
		\$		<div style="font-size: 2em; font-weight: bold;">2025</div>	
		2a Taxable amount			
		\$			
		2b Taxable amount not determined <input type="checkbox"/>		Total distribution <input type="checkbox"/>	
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)		8 Other	
				<input type="checkbox"/> IRA/SEP/SIMPLE \$ %	
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
\$		<input type="checkbox"/>	\$		\$
Account number (see instructions)		13 Date of payment		17 Local tax withheld	
				\$	
				18 Name of locality	
				\$	
				19 Local distribution	
				\$	

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

Copy 1
For State, City, or Local Tax Department

1099-R/Tax Information


VOID CORRECTED

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 2025 Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
	2a Taxable amount		

- Gross distribution in **Box 1** is the total benefit amount you received during the last calendar year.
- Taxable amount in **Box 2A** is the benefit amount subject to federal income tax.

1099-R/Tax Information


PAYER'S TIN	RECIPIENT'S TIN	3 Capital gain (included in box 2a) \$	4 Federal income tax withheld \$
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- Federal income tax withheld in **Box 4** is the amount of federal withholding deducted based on your W4-P on file with SERS or is based on mandatory withholding for lump sum distributions.

1099-R/Tax Information

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 <input type="checkbox"/>	8 Other \$ %
City or town, state or province, country, and ZIP or foreign postal code	9a Your percentage of total distribution %	9b Total employee contributions \$	



- Employee contributions in **Box 5** is the amount of your benefit that was nontaxable during the calendar year.
- SERS uses **Box 5** for contributions only.
- Insurance premiums paid are not reported on box 5. Insurance premiums paid are reported on your annual statement.

1099-R/Tax Information

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 <input type="checkbox"/>	8 Other	%
City or town, state or province, country, and ZIP or foreign postal code	9a Your percentage of total distribution %		9b Total employee contributions \$	

- Distributions codes in **Box 7** is the IRS code relating to the type of benefit being paid; pension, disability, etc.
- SERS does not send 1099Rs with incorrect coding. Those under 59 ½ will have a distribution code of 2, meaning you should not be charged the 10% excise tax because of an exemption. Once you reach age 60 the distribution code will read 7.

1099-R/Tax Information

10 Amount allocable to IRR within 5 years \$	11 1st year of desig. Roth contrib.	12 FATCA filing requirement <input type="checkbox"/>	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 \$ \$

- State tax withheld in **Box 14** is the total amount of Illinois state income tax withheld by request only.
- Additional funds can be withheld by submitting the Illinois State Income Tax Withholding (Form 3965).

1099-R/Tax Information

- If you are receiving multiple benefits from SERS, you will receive a 1099-R Form for each benefit received throughout that tax year.

For example: members receiving a survivor benefit and a retirement benefit.

1099-R/Tax Information

- If you don't receive your 1099-R Form by February 15th, contact SERS for a copy. Duplicate 1099R Forms will only be mailed to the current address SERS has on file for you.
- 1099-R forms are sent by the Illinois Comptroller's Office by January 31st of each year.