

**Substitute for Form W-2, Wage and Tax Statement, or
Form 1099-R, Distributions From Pensions, Annuities, Retirement
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

▶ **Attach to Form 1040 or 1040X.**

▶ **Go to www.irs.gov/Form4852 for the latest information.**

OMB No. 1545-0074

1 Name(s) shown on return

2 Your social security number

3 Address

4 Enter year in space provided and check one box. For the tax year ending December 31, _____,

I have been unable to obtain (or have received an incorrect) ☐ Form W-2 **OR** ☐ Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code

6 Employer's or payer's
TIN (if known)

7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation _____
b Social security wages _____
c Medicare wages and tips _____
d Social security tips _____
e Federal income tax withheld _____

f State income tax withheld _____
(Name of state) _____
g Local income tax withheld _____
(Name of locality) _____
h Social security tax withheld _____
i Medicare tax withheld _____

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

a Gross distribution _____
b Taxable amount _____
c Taxable amount not determined ☐
d Total distribution ☐
e Capital gain (included in line 8b) _____

f Federal income tax withheld _____
g State income tax withheld _____
(Name of state) _____
h Local income tax withheld _____
(Name of locality) _____
i Employee contributions _____
j Distribution codes _____

9 How did you determine the amounts on lines 7 and 8 above?

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.