

**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, 1040A, 1040-EZ, or 1040X.**

▶ **Information about Form 4852 is available at [www.irs.gov/form4852](http://www.irs.gov/form4852).**

**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 identification number (if known) \_\_\_\_\_

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

<b>a</b> Wages, tips, and other compensation _____	<b>f</b> State income tax withheld . . . . . _____ (Name of state) _____
<b>b</b> Social security wages . . . . . _____	<b>g</b> Local income tax withheld . . . . . _____ (Name of locality) _____
<b>c</b> Medicare wages and tips . . . . . _____	<b>h</b> Social security tax withheld . . . . . _____
<b>d</b> Social security tips . . . . . _____	<b>i</b> Medicare tax withheld . . . . . _____
<b>e</b> Federal income tax withheld . . . . . _____	

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

<b>a</b> Gross distribution . . . . . _____	<b>f</b> Federal income tax withheld . . . . . _____
<b>b</b> Taxable amount . . . . . _____	<b>g</b> State income tax withheld . . . . . _____
<b>c</b> Taxable amount not determined . . . . . <input type="checkbox"/>	<b>h</b> Local income tax withheld . . . . . _____
<b>d</b> Total distribution . . . . . <input type="checkbox"/>	<b>i</b> Employee contributions . . . . . _____
<b>e</b> Capital gain (included in line 8b) . . . . . _____	<b>j</b> 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. \_\_\_\_\_