

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

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.

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

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

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

