

**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, 1040-SR, 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 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.