

Federal Tax Form 1099-R Released

IRS Form 1099-R's for 2018 have been mailed on Tuesday, January 15, 2019 and will be available for viewing online at www.LSERS.net. After logging into the secure online portal:

1. Under the **Member Access** bar, select **View Personal Information**
2. On the next screen choose **1099-R**
3. Choose **Download Letter** next to Year 2018 to see your 1099-R and to print the form.

For tax information regarding your Form 1099-R, please contact your tax advisor.

Contact LSERS if you have not received your 1099-R by Monday, February 4th. You can email webmaster@lsers.net or call 225.925.6484 or toll free (outside the Baton Rouge calling area) at 1.800.256.3718. LSERS will send a duplicate copy to you.

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<input type="checkbox"/> CORRECTED (if checked)			OMB No. 1545-0119		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.			1 Gross distribution \$	2018	
			2a Taxable amount \$	Form 1099-R	
			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)	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 \$	
10 Amount allocable to IRR within 5 years \$	11 1st year of desig. Roth contrib.	FATCA filing requirement <input type="checkbox"/>	12 State tax withheld \$	13 State/Payer's state no.	14 State distribution \$
Account number (see instructions)		Date of payment	15 Local tax withheld \$	16 Name of locality	17 Local distribution \$

Form **1099-R** www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

ADDITIONAL INFORMATION

Reminder about your tax form:

- LSERS retirement benefits are not subject to Louisiana state income taxes for residents filing a Louisiana income tax return.

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- For security purposes, we have truncated your social security number to only show the last 4 digits.
- Box 1 Gross distribution: Total benefit amount you received for the calendar year 2018
- Box 2a Taxable amount: Taxable amount to be reported for Federal income tax purposes. Refer to Box 5 for explanation.
- Box 4 Federal incomes tax withheld: Federal income taxes withheld from your benefit payments in 2018.
- **Box 5** Employee contributions: **Tax-free portion of retirement benefits** you received during the calendar year. This is **NOT** the amount of your insurance premium. It represents *unsheltered contributions withheld from* your salary before July 1, 1994 that have already been taxed. This amount is the difference between the *Gross* distribution (Box 1) and the *Taxable* amount (Box 2a). **If Box 5 is blank**, your total gross distribution (benefits received) is taxable.
 - Disability retirees will not have tax-free benefits reflected in Box 5 until they reach their normal retirement eligibility age.