



**LSERS**

LOUISIANA SCHOOL EMPLOYEES' RETIREMENT SYSTEM

8660 United Plaza Blvd. (70809-7004) • P.O. Box 44516 • Baton Rouge, La 70804-4516

p. 225.925.6484 • 1.800.256.3718 • f. 225.922.1001 • www.lasers.net

## \*Federal Tax Form 1099-R Released\*

IRS Form 1099-R's for 2019 have been mailed as of Wednesday, January 15, 2020 and will be available for viewing online at [www.LSERS.net](http://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 2019 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 3rd. You can email [webmaster@lsers.net](mailto: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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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.		1 Gross distribution		OMB No. 1545-0119		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		2a Taxable amount		2019		
		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		This information is being furnished to the IRS.
		5 Employee contributions/ Designated Roth contributions or insurance premiums		6 Net unrealized appreciation in employer's securities		
RECIPIENT'S name		7 Distribution code(s)		8 Other		
Street address (including apt. no.)		IRA/ SEP/ SIMPLE <input type="checkbox"/>				
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.
\$				\$		\$
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



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## 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.
- 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 2019
- 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 2019.
- **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.