



**LSERS**

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

LOUISIANA SCHOOL EMPLOYEES' RETIREMENT SYSTEM

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

IRS Form 1099-R's for 2020 have been mailed as of Friday January 15, 2021 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 2020 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 Wednesday, 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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CORRECTED (if checked)

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 <b>2020</b> Form 1099-R		<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>			
		2a Taxable amount \$							
		2b Taxable amount not determined <input type="checkbox"/>		Total distribution <input type="checkbox"/>		<b>Copy B</b> Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.			
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 \$				This information is being furnished to the IRS.	
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.		12 FATCA filing requirement <input type="checkbox"/>		14 State tax withheld \$			
15 State/Payer's state no.		16 State distribution \$		17 Local tax withheld \$		18 Name of locality			
Account number (see instructions)		13 Date of payment		19 Local distribution \$					

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



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RETIREMENT SYSTEM

## 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 2020
- 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 2020.
- **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.