

MEMO# 2373

December 11, 1990

FINAL FORM 1099-R

December 11, 1990 TO: PENSION MEMBERS NO. 39-90 OPERATIONS MEMBERS NO. 35-90
TRANSFER AGENT ADVISORY COMMITTEE NO. 51-90 RE: FINAL FORM 1099-R

_____ As we previously informed you, the IRS combined Form W-2P and Form 1099-R beginning with the 1991 form. (See Institute Memorandum to Pension Members No. 28-90, Operations Members No. 16-90 and Transfer Agent Advisory Committee No. 16-90, dated June 18, 1990.) Attached is a copy of the final version of Form 1099-R for 1991 together with the instructions thereto. The final version is essentially identical to the draft proposed in June, with minor additions in the "street address" box to include a reference to apartment numbers and a notation that Copy A filed with the Internal Revenue Service Center should be filed with Form 1096. We will keep you informed of further developments. W. Richard Mason Assistant General Counsel Attachment

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