

MEMO# 1320

August 7, 1989

IRS ANNOUNCES PROPOSAL TO COMBINE FORMS 1099-R AND W-2P

August 7, 1989 TO: PENSION COMMITTEE NO. 3-89 OPERATIONS COMMITTEE NO. 13-89 RE:
IRS ANNOUNCES PROPOSAL TO COMBINE FORMS 1099-R AND W-2P

Attached is a copy of IRS Announcement 89-94, which states that the IRS is considering combining Forms 1099-R and W-2P for tax year 1991. Form W-2P would be eliminated and Form 1099-R would be designated Form 1099-R/W-2P. The new form would be filed only with the IRS, eliminating the need to file Form W-2P with the Social Security Administration. The announcement includes a proof copy of the proposed form. The proof copy contains all of the boxes currently used on Form 1099-R. The IRS has requested comments on this proposal by September 15, 1989. Please contact the undersigned by Friday, September 8 if you have any suggestions for inclusion in the Institute's comments. Kathy D. Ireland Assistant General Counsel Attachment

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