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OMB No. 1545–0008

2 Payer's name, address, and ZIP code

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8 Recipient's social security no.

9 Gross annuity, pension, etc.

10 Taxable amount

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12 Recipient's name (first, middle, last)

13

14 IRA code

For Paperwork Reduction Act Notice, see the back of copy D.

Copy A—For Social Security Administration
See Instructions for Forms W-2 and W-2P and back of Copy D.

15 Recipient's address and ZIP code

Form **W–2P 1982**

Statement for Recipients of Periodic
Annuities, Pensions, Retired Pay, or IRA Payments

Department of the Treasury
Internal Revenue Service

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1982

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Copy B—File with recipient's FEDERAL tax return
This information is being furnished to the Internal Revenue Service

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Form **W–2P 1982**

Statement for Recipients of Periodic
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Department of the Treasury
Internal Revenue Service

Notice to Recipient:

If you have nonwage income of more than \$500 and will owe tax of \$200 or more (\$300 for 1983), you should file Form 1040–ES, Declaration of Estimated Tax for Individuals, and pay the tax in installments during the year. You can, instead, have tax withheld from your pension or annuity. To arrange this, please file Form W–4P with the payer.

If the amount shown in box 9 is a payment from an IRA, box 14 has a code number showing the reason for the payment. The code is a four-digit number starting with 555. The fourth digit shows the reason for the payment. The codes are: 1 for premature (other than for disability or death); 2 for rollover; 3 for disability; 4 for death; 6 for other; 7 for normal; 8 for excess contributions plus earnings on such excess contributions; and 9 for transfer to an IRA for a spouse, incident to divorce.

If there is no entry in box 10, Taxable amount, the payer probably does not have all the facts needed for figuring the taxable amount. Since only the taxable amount is includible in income, you may want to get one of the following publications from an IRS office to help you figure the taxable amount:

Publication 567, Tax Information on U.S. Civil Service Retirement and Disability Retirement;

Publication 571, Tax-Sheltered Annuity Programs for Employees of Public Schools and Certain Tax-Exempt Organizations;

Publication 575, Pension and Annuity Income.

☆ U.S. GOVERNMENT PRINTING OFFICE : 1982—O-343-034

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Statement for Recipients of Periodic
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Department of the Treasury
Internal Revenue Service

Instructions

Please use this form to report periodic payments under a retirement plan. Examples are pensions, retainer pay, annuities under a purchased contract, and payments from individual retirement accounts or annuities. Payments to retired military persons and some court officials are now reported on Form W–2P instead of on Form W–2, Wage and Tax Statement. See separate **Instructions for Forms W–2 and W–2P** for more information on how to complete Form W–2P.

Use Form W–2 to report payments that are subject to social security (FICA) tax.

You need not file Form W–2P for the following cases: (a) You paid retirement benefits that are exempt from tax. Examples are social security, workmen's compensation, most railroad retirement, and Veterans Administration payments. (b) You made payments as a fiduciary, filed Form 1041, and gave each beneficiary a Schedule K–1 (Form 1041). (c) You made total distributions reported on Form 1099R.

PAPERWORK REDUCTION ACT NOTICE.—The Paperwork Reduction Act of 1980 says we must tell you why we are collecting this information, how we will use it, and whether you have to give it to us. We ask for the information to carry out the Internal Revenue Laws of the United States. We need it to ensure that you are complying with these laws and to allow us to figure and collect the right amount of tax. You are required to give us this information.

☆ U.S. GOVERNMENT PRINTING OFFICE : 1982—O-343-034

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