

copy for my Rewards



OKLAHOMA RESIDENT INCOME TAX RETURN

Your Social Security Number Place an 'X' in this box if this taxpayer is deceased

Spouse's Social Security Number (joint return only) Place an 'X' in this box if this taxpayer is deceased

AMENDED RETURN!
Place an 'X' in this box if this is an amended 511. See Schedule 511-H.

NAME AND ADDRESS PLEASE PRINT OR TYPE

Your first name, middle initial and last name
ANTHONY D GEORGE

If a joint return, spouse's first name, middle initial and last name

Mailing address (number and street, including apartment number, rural route or PO Box)

City, State and ZIP
OK 747

FILING STATUS

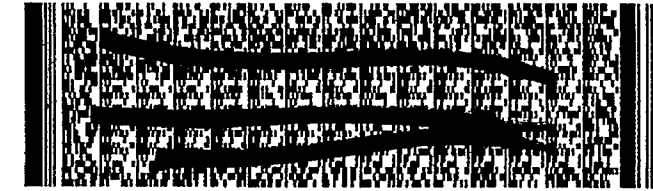
1 Single 642E18 . 01120038V18 . 0112003

2 Married filing joint return (even if only one had income)

3 Married filing separate
• If spouse is also filing, list Name: SSN:

4 Head of household with qualifying person

5 Qualifying widow(er) with dependent child
• Please list the year spouse died in box at right:



* NOTE: If claiming Special Exemption, see instructions on page 6 of 511 Packet.

	REGULAR	*SPECIAL	BLIND
YOURSELF	X		
SPOUSE			

1
0

NUMBER OF DEPENDENT CHILDREN

NUMBER OF OTHER DEPENDENTS

ADD THE TOTALS FROM THE 4 BOXES. WRITE THE TOTAL IN THE BOX BELOW.
TOTAL: 1

NOTE: IF YOU MAY BE CLAIMED AS A DEPENDENT ON ANOTHER RETURN, ENTER "0" FOR YOUR REGULAR EXEMPTION.

AGE 65 OR OVER? (Please see instructions) Yourself Spouse

PART ONE: TO ARRIVE AT OKLAHOMA ADJUSTED GROSS INCOME

		Round to Nearest Whole Dollar
1	Federal adjusted gross income (from Federal 1040, 1040A, or 1040EZ).....	0 00
2	Oklahoma Subtractions (provide Schedule 511-A).....	0 00
3	Line 1 minus line 2.....	0 00
4	Out-of-state income, except wages. Describe (4a) (Provide Federal schedule with detailed description; see instructions) ..	00
5	Line 3 minus line 4b.....	0 00
6	Oklahoma Additions (provide Schedule 511-B).....	0 00
7	Oklahoma adjusted gross income (line 5 plus line 6)..... (If line 7 is different than line 1, provide a copy of your Federal return.)	0 00

PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS

8	Oklahoma Adjustments (provide Schedule 511-C).....	0 00
9	Oklahoma income after adjustments (line 7 minus line 8).....	0 00

STOP AND READ: If line 4b is zero, complete lines 10-11. If line 4b is more than zero, see Schedule 511-D and do not complete lines 10-11.

10A	Federal itemized deductions from Federal Schedule A, line 29..... 10A <input type="text"/> 00 (Provide copy of the Federal Schedule A.) (If you did not itemize, skip lines 10A and 10B; enter the Oklahoma standard deduction on line 10C)	
10B	State and local sales or income taxes included in line 10A..... 10B <input type="text"/> 00	
10C	Oklahoma itemized deductions (line 10A minus line 10B) or Oklahoma standard deduction (Single or Married Filing Separate: \$6,350 • Married Filing Joint or Qualifying Widow(er): \$12,700 • Head of Household: \$9,350)..... 10C	6,350 00
11	Exemptions (\$1,000 x total number of exemptions claimed above)..... 11	1,000 00
12	Total deductions and exemptions (add lines 10C and 11 or amount from Sch. 511-D, line 5)..... 12	7,350 00
13	Oklahoma Taxable Income (line 9 minus line 12)..... 13	-7,350 00
14	Oklahoma Income Tax from Tax Table (see pages 20-31 of instructions) If using Farm Income Averaging, enter tax from Form 573, line 22 and enter a "1" in box. If paying the Health Savings Account additional 10% tax, add additional tax here and enter a "2" in box. If recapturing the Oklahoma Affordable Housing Tax Credit, add recaptured credit here and enter a "3" in box.... <input type="checkbox"/> .. 14	0 00

STOP AND READ: If line 7 is equal to or larger than line 1, complete lines 15 and 16. If line 7 is smaller than line 1, complete Schedules 511-E and 511-F.

15	Oklahoma child care/child tax credit (see instructions)..... 15	00
16	Oklahoma earned income credit (see instructions)..... 16	00
17	Credit for taxes paid to another state (provide Form 511TX)..... 17	00
18	Form 511CR - Other Credits Form. List 511CR line number claimed here: <input type="text"/> .. 18	0 00
19	Income Tax (line 14 minus lines 15-18) Do not enter less than zero 19	0 00

DO NOT PAY THIS AMOUNT. PAYMENT IS FIGURED ON LINE 43.



Name(s) shown on Form 511: **ANTHONY GEORGE**

Your Social Security Number: [REDACTED]

PART THREE: TAX, CREDITS AND PAYMENTS

20	Total from line 19	20	0	00
21	Use tax due on internet, mail order, or other out-of-state purchases (For use tax table, see page 11 of the Packet) if you certify that no use tax is due, place an 'X' here: <input checked="" type="checkbox"/>	21		00
22	Balance (add lines 20 and 21)	22	0	00
23	Oklahoma withholding (provide all W-2s, 1099s or other withholding statements)	23	1,129	00
24	2017 estimated tax payments (qualified farmer <input type="checkbox"/>)	24		00
25	2017 payment with extension	25		00
26	Low Income Property Tax Credit (provide Form 538-H)	26		00
27	Sales Tax Relief Credit (provide Form 538-S)	27	0	00
28	Natural Disaster Tax Credit (provide Form 576)	28		00
29	Credits from Form a) <input type="checkbox"/> 577 b) <input type="checkbox"/> 578	29		00
30	Amount paid with original return plus additional paid after it was filed (amended return only)	30		00
31	Payments and credits (add lines 23-30)	31	1,129	00
32	Overpayment, if any, as shown on original return and/or prior amended return(s) or as previously adjusted by Oklahoma (amended return only)	32		00
33	Total payments and credits (line 31 minus line 32)	33	1,129	00

PART FOUR: REFUND

34	If line 33 is more than line 22, subtract line 22 from line 33. This is your overpayment	34	1,129	00
35	Amount of line 34 to be applied to 2018 estimated tax (original return only) (For further information regarding estimated tax, see page 4 of the 511 Packet)	35	0	00
Schedule 511-G provides you with the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Please place the line number of the organization from Schedule 511-G in the box below. If you give to more than one organization, put a "99" in the box. Provide Schedule 511-G				
36	Donations from your refund (total from Schedule 511-G)	36	0	00
37	Total deductions from refund (add lines 35 and 36)	37		00
38	Amount to be refunded to you (line 34 minus line 37)	38	1,129	00

Direct Deposit Note: Verify your account and routing numbers are correct. If your direct deposit fails to process or you do not choose direct deposit, you will receive a debit card. See the 511 Packet for direct deposit and debit card information.

Is this refund going to or through an account that is located outside of the United States? Yes No

Deposit my refund in my:

checking account Routing Number: [REDACTED]

savings account Account Number: [REDACTED]

PART FIVE: AMOUNT YOU OWE

39	If line 22 is more than line 33, subtract line 33 from line 22. This is your tax due	39		00
40	Donation: Support the Oklahoma General Revenue Fund (original return only)	40		00
41	Underpayment of estimated tax interest (annualized installment method) (If you have an underpayment of estimated tax (line 41) & overpayment (line 34), see instructions.)	41		00
42	For delinquent payment add penalty of 5% plus interest of 1.25% per month	42		00
43	Total tax, donation, penalty and interest (add lines 39-42)	43		00

Under penalty of perjury, I declare the information contained in this document, and all attachments and schedules, is true and correct to the best of my knowledge and belief. Place an 'X' in this box if the Oklahoma Tax Commission may disclose this return with your tax preparer.

Taxpayer's Signature <i>[Signature]</i> Date 4-22-18	Spouse's signature Date	Paid Preparer's signature Date
Taxpayer's occupation private sector	Spouse's occupation	Paid Preparer's address and phone number
Daytime Phone (optional)	Daytime Phone (optional)	Paid Preparer's PTIN

DO NOT STAPLE DOCUMENTATION TO THIS FORM. TO ATTACH ITEMS, PLEASE USE A PAPER CLIP.
MAILING ADDRESS FOR THIS FORM: P.O. BOX 269045, OKLAHOMA CITY, OK 73126-9045
The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.

copy for my records

Form **4852**
(Rev. September 2017)

**Substitute for Form W-2, Wage and Tax Statement, or
Form 1099-R, Distributions From Pensions, Annuities, Retirement
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.
▶ Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return
Anthony D. George

2 Your social security number
[REDACTED]

3 Address
[REDACTED], Ok 747

Handy
Notify

4 Enter year in space provided and check one box. For the tax year ending December 31, 2017,
I have been unable to obtain (or have received an incorrect) Form W-2 OR Form 1099-R.
I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code
[REDACTED]

6 Employer's or payer's identification number (if known)
[REDACTED]

7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	_____	f State income tax withheld	_____
b Social security wages	_____	(Name of state)	_____
c Medicare wages and tips	_____	g Local income tax withheld	_____
d Social security tips	_____	(Name of locality)	_____
e Federal income tax withheld	_____	h Social security tax withheld	_____
		i Medicare tax withheld	_____

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

a Gross distribution	_____	f Federal income tax withheld	_____
b Taxable amount	_____ 3451.99	g State income tax withheld	_____ 690.40
c Taxable amount not determined	<input type="checkbox"/>	h Local income tax withheld	_____ 172.60
d Total distribution	<input type="checkbox"/>	i Employee contributions	_____
e Capital gain (included in line 8b)	_____	j Distribution codes	_____

9 How did you determine the amounts on lines 7 and 8 above?
line 8 b was corrected. I did NOT receive any "wages" as defined in section 3401 (a) and 3121 (a) . No "gains, profit, or income" was made in the course of a trade or business. However line 8 f,&g are correct.

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
none

General Instructions

Section references are to the Internal Revenue Code.
Future developments. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be available at www.irs.gov/Form4852.
Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.
You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.
Note: Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use your Social Security online account to verify wages reported by your employers. Please visit www.SSA.gov/myaccount. Or, you may contact your local SSA office to verify wages reported by your employer.
Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.
Penalties. The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include:

Copy my Records

Form **4852**
(Rev. September 2017)

Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.
▶ Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return Anthony D. George		2 Your social security number [REDACTED]	
3 Address [REDACTED] Ok 745 [REDACTED]			
4 Enter year in space provided and check one box. For the tax year ending December 31, <u>2017</u> I have been unable to obtain (or have received an incorrect) <input checked="" type="checkbox"/> Form W-2 OR <input type="checkbox"/> Form 1099-R. I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.			
5 Employer's or payer's name, address, and ZIP code [REDACTED]			6 Employer's or payer's identification number (if known) [REDACTED]
7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.			
a Wages, tips, and other compensation <u>0</u>		f State income tax withheld <u>780.00</u> (Name of state) <u>Ok</u>	
b Social security wages <u>0</u>		g Local income tax withheld <u>0</u> (Name of locality) <u>n/a</u>	
c Medicare wages and tips <u>0</u>		h Social security tax withheld <u>1642.51</u>	
d Social security tips <u>n/a</u>		i Medicare tax withheld <u>384.13</u>	
e Federal income tax withheld <u>1906.65</u>			
8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.			
a Gross distribution _____		f Federal income tax withheld _____	
b Taxable amount _____		g State income tax withheld _____	
c Taxable amount not determined <input type="checkbox"/>		h Local income tax withheld _____	
d Total distribution <input type="checkbox"/>		i Employee contributions _____	
e Capital gain (included in line 8b) _____		j Distribution codes _____	
9 How did you determine the amounts on lines 7 and 8 above?			

Records provided by payer listed on line 5 I did NOT receive any "wages" as defined in section 3121 (a) and 3401 (a)
To explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

none

General Instructions

Section references are to the Internal Revenue Code.

Future developments. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be published in the Instructions for Form 4852.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return, you may use the Form 4852 that the IRS sends you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note: Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you are receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use your Social Security online account to verify wages reported by your employers. Please visit www.SSA.gov/myaccount. Or, you may contact your local SSA office to verify wages reported by your employer.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.

Penalties. The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include:

COPY for my Records

Form **4852**

(Rev. September 2017)

Department of the Treasury
Internal Revenue Service

**Substitute for Form W-2, Wage and Tax Statement, or
Form 1099-R, Distributions From Pensions, Annuities, Retirement
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.

▶ Go to www.irs.gov/Form4852 for the latest information.

OMB No. 1545-0074

1 Name(s) shown on return **2** Your social security number

Anthony D. George

3 Address

1000 ... Ok 747

Hereby
Notify

4 Enter year in space provided and check one box. For the tax year ending December 31, 2017,

I have been unable to obtain (or have received an incorrect) Form W-2 OR Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code

6 Employer's or payer's identification number (if known)

7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	_____ 0	f State income tax withheld	_____ 1286.54/176.00
b Social security wages	_____ 0	(Name of state)	La/Ok
c Medicare wages and tips	_____ 0	g Local income tax withheld	_____ 0
d Social security tips	_____ n/a	(Name of locality)	n/a
e Federal income tax withheld	_____ 2419.10	h Social security tax withheld	_____ 2930.56
		i Medicare tax withheld	_____ 685.37

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

a Gross distribution	_____	f Federal income tax withheld	_____
b Taxable amount	_____	g State income tax withheld	_____
c Taxable amount not determined	<input type="checkbox"/>	h Local income tax withheld	_____
d Total distribution	<input type="checkbox"/>	i Employee contributions	_____
e Capital gain (included in line 8b)	_____	j Distribution codes	_____

9 How did you determine the amounts on lines 7 and 8 above?

Records provided by payer listed on line 5 I did NOT receive any "wages" as defined in section 3121 (a) and 3401 (a)

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

none

General Instructions

Section references are to the Internal Revenue Code.

Future developments. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be available at www.irs.gov/Form4852.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note: Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use your Social Security online account to verify wages reported by your employers. Please visit www.SSA.gov/myaccount. Or, you may contact your local SSA office to verify wages reported by your employer.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.

Penalties. The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include:

COPY for my records

Form **4852**
(Rev. September 2017)

**Substitute for Form W-2, Wage and Tax Statement, or
Form 1099-R, Distributions From Pensions, Annuities, Retirement
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.
▶ Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return
Anthony D. George

2 Your social security number
[REDACTED]

3 Address
[REDACTED]

Hereby
Notify

4 Enter year in space provided and check one box. For the tax year ending December 31, 2017,

I have been unable to obtain (or have received an incorrect) Form W-2 OR Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address, and ZIP code
[REDACTED]

6 Employer's or payer's identification number (if known)
[REDACTED]

7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	_____	f State income tax withheld	_____
b Social security wages	_____	(Name of state)	_____
c Medicare wages and tips	_____	g Local income tax withheld	_____
d Social security tips	_____	(Name of locality)	_____
e Federal income tax withheld	_____	h Social security tax withheld	_____
		i Medicare tax withheld	_____

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

a Gross distribution	_____	f Federal income tax withheld	_____
b Taxable amount	<u>904.56</u>	g State income tax withheld	_____
c Taxable amount not determined	<input type="checkbox"/>	h Local income tax withheld	_____
d Total distribution	<input type="checkbox"/>	i Employee contributions	_____
e Capital gain (included in line 8b)	_____	j Distribution codes	_____

9 How did you determine the amounts on lines 7 and 8 above?

line 8 b was corrected. I did NOT receive any "wages" as defined in section 3401 (a) and 3121 (a) . No "gains, profit, or income" was made in the course of a trade or buisiness.

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.

none

General Instructions

Section references are to the Internal Revenue Code.

Future developments. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be available at www.irs.gov/Form4852.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note: Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use your Social Security online account to verify wages reported by your employers. Please visit www.SSA.gov/myaccount. Or, you may contact your local SSA office to verify wages reported by your employer.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.

Penalties. The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include: