

USPS Certified Mail – 7020 0640 0000 8163 3840  
Return Receipt #9590 9402 6475 0346 0199 40

April 15, 2022

Department of the Treasury  
Internal Revenue Service  
Kansas City, MO 64999-0002

Enclosed please find the original filing of my 2021 tax year 1040-SR return. I've also enclosed (4) 4852 and (2) 1099's.

The four 4852 forms are being submitted to rebut and correct information on the 1099-R documents that are known to have been sent to the IRS by "PAYER" on line 5 of each of the 4852 forms. The 1099-R document erroneously allege that we, Bruce A and Andrea Comeau, "recipient", received payments from the "PAYER" during or connected to a "trade or business," federal or federally connected employment, investment, or other taxable activities.

The payments made to us, Bruce and Andrea Comeau, by the "PAYER" on the document, did not result from any federally taxable activity whatsoever and do not constitute any taxable income under relevant Income Tax law, specifically Section 3401(a) and Section 321(a) of IRC Title 26. The amounts shown as "federal income tax withheld" are correct according to information provided to us, Bruce and Andrea Comeau, by the "PAYER" and should already be part of IRS records as provided to you by the "PAYER".

We, Bruce and Andrea Comeau, are not of any status or connected with any activity that would render payments by the "PAYER" to us subject to federal income excise tax. We cannot explain the reasons for which the "PAYER" reported these payments as income.

Under penalties of perjury, we declare that these statements and accompanying documents to the best of our knowledge and belief, are true, correct and complete.

Sincerely, 

Bruce A Comeau, April 15, 2022

Of my own right and without representation, with explicit reservation of all my rights and without prejudice.



Andrea Comeau, April 15, 2022

Of my own right and without representation, with explicit reservation of all my rights and without prejudice.

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  
 Head of household (HOH)  Qualifying widow(er) (QW)  
 Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial: Bruce A  
 Last name: Comeau  
 Your social security number: [REDACTED]  
 If joint return, spouse's first name and middle initial: Andrea  
 Last name: Comeau  
 Spouse's social security number: [REDACTED]

Home address (number and street). If you have a P.O. box, see instructions. [REDACTED] Apt. no. [REDACTED]  
 City, town, or post office. If you have a foreign address, also complete spaces below. [REDACTED] State: Wisconsin ZIP code: [REDACTED]  
 Foreign country name: Foreign province/state/county: Foreign postal code: [REDACTED]  
**Presidential Election Campaign**  
 Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.  You  Spouse

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?  Yes  No

**Standard Deduction** Someone can claim:  You as a dependent  Your spouse as a dependent  
 Spouse itemizes on a separate return or you were a dual-status alien

**Age/Blindness** You:  Were born before January 2, 1957  Are blind  
 Spouse:  Was born before January 2, 1957  Is blind

Dependents (see instructions):	(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> If qualifies for (see instructions):	
					Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>


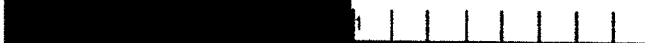
Attach Schedule B if required.	1	Wages, salaries, tips, etc. Attach Form(s) W-2	1	0
	2a	Tax-exempt interest . . . . . 12.58	2b	Taxable interest . . . . . 0
	3a	Qualified dividends . . . . . 0	3b	Ordinary dividends . . . . . 0
	4a	IRA distributions . . . . . 16986.18	4b	Taxable amount . . . . . 0
	5a	Pensions and annuities . . . . . 15152.16	5b	Taxable amount . . . . . 0
	6a	Social security benefits . . . . . 17598.00	6b	Taxable amount . . . . . 0
	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here . . . . . <input type="checkbox"/>	7	0
	8	Other income from Schedule 1, line 10 . . . . .	8	0
	9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income . . ▶	9	0
	10	Adjustments to income from Schedule 1, line 26 . . . . .	10	0
	11	Subtract line 10 from line 9. This is your adjusted gross income . . ▶	11	0

**Standard Deduction**

See *Standard Deduction Chart* on the last page of this form.

<b>12a</b>	<b>Standard deduction or itemized deductions (from Schedule A)</b> . . . . .	<b>12a</b>	25100		
<b>b</b>	<b>Charitable contributions if you take the standard deduction (see instructions)</b> . . . . .	<b>12b</b>	0		
<b>c</b>	<b>Add lines 12a and 12b</b> . . . . .	<b>12c</b>		25100	
<b>13</b>	<b>Qualified business income deduction from Form 8995 or Form 8995-A</b> . . . . .	<b>13</b>		0	
<b>14</b>	<b>Add lines 12c and 13</b> . . . . .	<b>14</b>		25100	
<b>15</b>	<b>Taxable income.</b> Subtract line 14 from line 11. If zero or less, enter -0- . . . . .	<b>15</b>		0	
<b>16</b>	<b>Tax (see instructions). Check if any from:</b> 1 <input type="checkbox"/> Form(s) 8814   2 <input type="checkbox"/> Form 4972   3 <input type="checkbox"/> 0 . . . . .	<b>16</b>		0	
<b>17</b>	<b>Amount from Schedule 2, line 3</b> . . . . .	<b>17</b>		0	
<b>18</b>	<b>Add lines 16 and 17</b> . . . . .	<b>18</b>		0	
<b>19</b>	<b>Nonrefundable child tax credit or credit for other dependents from Schedule 8812</b> . . . . .	<b>19</b>		0	
<b>20</b>	<b>Amount from Schedule 3, line 8</b> . . . . .	<b>20</b>		0	
<b>21</b>	<b>Add lines 19 and 20</b> . . . . .	<b>21</b>		0	
<b>22</b>	<b>Subtract line 21 from line 18. If zero or less, enter -0-</b> . . . . .	<b>22</b>		0	
<b>23</b>	<b>Other taxes, including self-employment tax, from Schedule 2, line 21</b> . . . . .	<b>23</b>		0	
<b>24</b>	<b>Add lines 22 and 23. This is your total tax</b> . . . . . ▶	<b>24</b>		0	
<b>25</b>	<b>Federal income tax withheld from:</b>				
<b>a</b>	<b>Form(s) W-2</b> . . . . .	<b>25a</b>	7739.88		
<b>b</b>	<b>Form(s) 1099</b> . . . . .	<b>25b</b>	520.00		
<b>c</b>	<b>Other forms (see instructions)</b> . . . . .	<b>25c</b>			
<b>d</b>	<b>Add lines 25a through 25c</b> . . . . .	<b>25d</b>		8259.88	
<b>26</b>	<b>2021 estimated tax payments and amount applied from 2020 return</b> . . . . .	<b>26</b>		0	
<b>27a</b>	<b>Earned income credit (EIC)</b> . . . . .	<b>27a</b>	0		
	Check here if you were born after January 1, 1998, and before January 2, 2004, and you satisfy all the other requirements for taxpayers who are at least age 18 to claim the EIC. See instructions . . . ▶ <input type="checkbox"/>				
<b>b</b>	<b>Nontaxable combat pay election</b> . . . . .	<b>27b</b>			
<b>c</b>	<b>Prior year (2019) earned income</b> . . . . .	<b>27c</b>			
<b>28</b>	<b>Refundable child tax credit or additional child tax credit from Schedule 8812</b> . . . . .	<b>28</b>			
<b>29</b>	<b>American opportunity credit from Form 8863, line 8</b> . . . . .	<b>29</b>			
<b>30</b>	<b>Recovery rebate credit. See instructions</b> . . . . .	<b>30</b>			
<b>31</b>	<b>Amount from Schedule 3, line 15</b> . . . . .	<b>31</b>			
<b>32</b>	<b>Add lines 27a and 28 through 31. These are your total other payments and refundable credits</b> . . . . . ▶	<b>32</b>		0	
<b>33</b>	<b>Add lines 25d, 26, and 32. These are your total payments</b> . . . . . ▶	<b>33</b>		8259.88	

If you have a qualifying child, attach Sch. EIC.

<b>Refund</b>	<b>34</b>	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid . . . . .	<b>34</b>	8259.88
	<b>35a</b>	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here . . . . . <input type="checkbox"/>	<b>35a</b>	8259.88
Direct deposit? See instructions.	<b>b</b>	Routing number 	<b>c</b>	Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings
	<b>d</b>	Account number 		
	<b>36</b>	Amount of line 34 you want applied to your 2022 estimated tax . . . . .	<b>36</b>	0
<b>Amount You Owe</b>	<b>37</b>	Amount you owe. Subtract line 33 from line 24. For details on how to pay, see instructions . . . . .	<b>37</b>	0
	<b>38</b>	Estimated tax penalty (see instructions) . . . . .	<b>38</b>	0

**Third Party Designee** Do you want to allow another person to discuss this return with the IRS? See instructions . . . . .  Yes. Complete below.  No

Designee's name ▶ Phone no. ▶ Personal identification number (PIN) ▶

**Sign Here** Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.	Your signature <i>B. A. Comeau</i>	Date 4/15/22	Your occupation Retired	If the IRS sent you an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
	Spouse's signature. If a joint return, both must sign. <i>Andrea Comeau</i>	Date 4-15-22	Spouse's occupation working	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.) <input type="text"/>
	Phone no.	Email address		

**Paid Preparer Use Only**

Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
Firm's name ▶	Firm's address ▶			Phone no.
				Firm's EIN ▶

**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, 1040-SR, or 1040-X.  
▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

Attachment  
Sequence No. 04

**You must take the following steps before filing Form 4852**

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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 to file with your return.

<b>1 Name(s) shown on return</b> Andrea Comeau	<b>2 Your social security number</b> [REDACTED]
---	--

**3 Address**  
[REDACTED]

**4 Enter year in space provided and check one box.** For the tax year ending December 31, 2021,  
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.

<b>5 Employer's or payer's name, address, and ZIP code</b> [REDACTED]	<b>6 Employer's or payer's TIN (if known)</b> [REDACTED]
--	---

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

<b>a</b> Wages, tips, and other compensation	0	<b>f</b> State income tax withheld	2579.57
<b>b</b> Social security wages	0	(Name of state) . Wisconsin	
<b>c</b> Medicare wages and tips	0	<b>g</b> Local income tax withheld	0
<b>d</b> Social security tips	0	(Name of locality)	
<b>e</b> Federal income tax withheld	3930.95	<b>h</b> Social security tax withheld	3086.98
		<b>i</b> Medicare tax withheld	721.95

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

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

**9 How did you determine the amounts on lines 7 and 8 above?**  
The amounts provided by the "PAYER" under "Wages" are incorrect. The amounts listed do not qualify as "Wages" as defined in IRC-Sections 3401(a) and 3121(a).

**10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.**  
None

**General Instructions**

Section references are to the Internal Revenue Code.  
**Future developments.** For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852).  
**Purpose of form.** Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) 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 (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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.

**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, 1040-SR, or 1040-X.  
▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

Attachment  
Sequence No. 04

**You must take the following steps before filing Form 4852**

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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 to file with your return.

<b>1 Name(s) shown on return</b> Bruce A Comeau	<b>2 Your social security number</b> [REDACTED]
--	--

**3 Address**  
[REDACTED]

**4 Enter year in space provided and check one box.** For the tax year ending December 31, 2021, 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.

<b>5 Employer's or payer's name, address, and ZIP code</b> [REDACTED]	<b>6 Employer's or payer's TIN (if known)</b> [REDACTED]
--	---

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

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

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

<p>a Gross distribution . . . . . 15152.16</p> <p>b Taxable amount . . . . . 0.00</p> <p>c Taxable amount not determined . . . . . <input type="checkbox"/></p> <p>d Total distribution . . . . . <input type="checkbox"/></p> <p>e Capital gain (included on line 8b) . . . . . _____</p>	<p>f Federal income tax withheld . . . . . 520.00</p> <p>g State income tax withheld . . . . . 120.00 (Name of state) . . . . . Wisconsin</p> <p>h Local income tax withheld . . . . . _____ (Name of locality) _____</p> <p>i Employee contributions . . . . . _____</p> <p>j Distribution codes . . . . . _____</p>
--	---

**9 How did you determine the amounts on lines 7 and 8 above?**  
This distribution is my source of capital. This capital does not qualify as "Wages" as defined in 26 USC and IRC-Sections 3401(a) and 3121(a), and the payments made by this institution were from money that is capital, not income. The 1099-R from this institution was issued in error.

**10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.**  
*None*

**General Instructions**

Section references are to the Internal Revenue Code.  
**Future developments.** For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852).  
**Purpose of form.** Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) 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 (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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.

**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, 1040-SR, or 1040-X  
▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

Attachment  
Sequence No. 04

**You must take the following steps before filing Form 4852**

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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 to file with your return.

<b>1 Name(s) shown on return</b> Bruce A Comeau	<b>2 Your social security number</b> [REDACTED]
--	--

**3 Address**  
[REDACTED]

**4 Enter year in space provided and check one box.** For the tax year ending December 31, 2021,  
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.

<b>5 Employer's or payer's name, address, and ZIP code</b> [REDACTED]	<b>6 Employer's or payer's TIN (if known)</b> [REDACTED]
--	---

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

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

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

<b>a</b> Gross distribution . . . . . <u>8735.67</u>	<b>f</b> Federal income tax withheld . . . . . <u>0.00</u>
<b>b</b> Taxable amount . . . . . <u>0.00</u>	<b>g</b> State income tax withheld . . . . . <u>0.00</u>
<b>c</b> Taxable amount not determined . . . . . <input type="checkbox"/>	(Name of state) . . . . . _____
<b>d</b> Total distribution . . . . . <input type="checkbox"/>	<b>h</b> Local income tax withheld . . . . . _____
<b>e</b> Capital gain (included on line 8b) . . . . . _____	(Name of locality) . . . . . _____
	<b>i</b> Employee contributions . . . . . _____
	<b>j</b> Distribution codes . . . . . _____

**9 How did you determine the amounts on lines 7 and 8 above?**  
This distribution is my source of capital. This capital does not qualify as "Wages" as defined in 26 USC and IRC-Sections 3401(a) and 3121(a), and the payments made by this institution were from money that is capital, not income. The 1099-R from this institution was issued in error.

**10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.**  
*None*

**General Instructions**

Section references are to the Internal Revenue Code.  
**Future developments.** For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852).  
**Purpose of form.** Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) 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 (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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.

**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, 1040-SR, or 1040-X.  
▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

Attachment  
Sequence No. 04

**You must take the following steps before filing Form 4852**

- Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.
- If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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 to file with your return.

<b>1 Name(s) shown on return</b> Andrea Comeau	<b>2 Your social security number</b> [REDACTED]
---	--

**3 Address**  
[REDACTED]

**4 Enter year in space provided and check one box. For the tax year ending December 31, 2021,**  
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.

<b>5 Employer's or payer's name, address, and ZIP code</b> [REDACTED]	<b>6 Employer's or payer's TIN (if known)</b> [REDACTED]
--	---

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

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

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

<b>a</b> Gross distribution . . . . . 8250.51	<b>f</b> Federal income tax withheld . . . . . 0.00
<b>b</b> Taxable amount . . . . . 0.00	<b>g</b> State income tax withheld . . . . . 0.00 (Name of state) _____
<b>c</b> Taxable amount not determined . <input type="checkbox"/>	<b>h</b> Local income tax withheld . . . . . _____ (Name of locality) _____
<b>d</b> Total distribution . . . . . <input type="checkbox"/>	<b>i</b> Employee contributions . . . . . _____
<b>e</b> Capital gain (included on line 8b) . _____	<b>j</b> Distribution codes . . . . . _____

**9 How did you determine the amounts on lines 7 and 8 above?**  
This distribution is my source of capital. This capital does not qualify as "Wages" as defined in 26 USC and IRC-Sections 3401(a) and 3121(a), and the payments made by this institution were from money that is capital, not income. The 1099-R from this institution was issued in error.

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

**General Instructions**

Section references are to the Internal Revenue Code.  
**Future developments.** For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852).  
**Purpose of form.** Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) 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 (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 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.



Copy B, For Recipient

For Calendar Year 2021  
Tax ID# [REDACTED]  
Bank ID# [REDACTED]  
Bank Ph# [REDACTED]  
Corrected Form(s)  
Keep For Your Records  
Rev. November 2019

ANDREA COMEAU  
[REDACTED]

1099-SA: Distributions From an HSA, Archer MSA, or Medicare Advantage MSA

OMB No. 1545-1517  
For Calendar Year 2021

This information is being furnished to the IRS.

Account number (see instructions):  
Box 1. Gross distribution:  
Box 3. Distribution code:  
Box 5. Account type:

0.00

HSA

1099-SA Form Totals:

Box 1. Gross distribution:

[www.irs.gov/Form1099SA](http://www.irs.gov/Form1099SA)

Department of the Treasury - Internal Revenue Service

"This statement is submitted to rebut a document known to have been submitted by the party identified above as "PAYER" which erroneously alleges a payment to the party identified above as the "RECIPIENT" of "gains profit or income" made in the course of conducting a "trade or business".

"No payments were received by the "RECIPIENT" from the "PAYER" which were connected with the performance of the functions of a public office, or otherwise constituted gains, profit or income within the means of relevant law." (or whatever else is actually the case);

"Under penalty of perjury, I declare that I have examined this statement and to the best of my knowledge and belief, it is true, complete and correct."

Andrea Comeau

4-15-2022

Andrea Comeau

Date

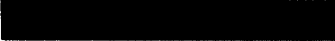
Copy B, For Recipient



Tax Year 2021  
Tax ID#  
Bank ID#  
Bank Ph#  
Corrected Form(s) No  
Keep For Your Records



ANDREA COMEAU



1099-INT: Interest Income

OMB No. 1545-0112  
Tax Year 2021

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Account number (see instructions):  
Box 1. Interest income:

DDA-0000383021  
0.00

1099-INT Form Totals:

Box 1. Interest income:

[www.irs.gov/Form1099INT](http://www.irs.gov/Form1099INT)

0.00

Department of the Treasury - Internal Revenue Service

"This statement is submitted to rebut a document known to have been submitted by the party identified above as "PAYER" which erroneously alleges a payment to the party identified above as the "RECIPIENT" of "gains profit or income" made in the course of conducting a "trade or business".

"No payments were received by the "RECIPIENT" from the "PAYER" which were connected with the performance of the functions of a public office, or otherwise constituted gains, profit or income within the means of relevant law." (or whatever else is actually the case);

"Under penalty of perjury, I declare that I have examined this statement and to the best of my knowledge and belief, it is true, complete and correct."

*Andrea Comeau*

4-15-2022

Andrea Comeau

Date