Review the directions below and answer accordingly. Visit our website for directions on submitting your forms using our Secure Upload Portal, or by mail, or fax.

___ 1.) The untaxed portion of the distribution was rolled over into an IRA/pension investment.

___ 2.) The untaxed portion of the distribution was received as a payment. The payment was utilized for:
   □ Medical Expenses  _____ %    □ Household Expenses  _____ %
   □ Debt Payments  _____ %    □ Personal Use  _____ %

___ 3.) Part of the untaxed portion of the distribution was rolled over into an IRA/pension and part was received as a payment.

   Rollover amount: $___________  Payment amount: $___________

   The payment was utilized for:
   □ Medical Expenses  _____ %    □ Household Expenses  _____ %
   □ Debt Payments  _____ %    □ Personal Use  _____ %

___ 4.) The entire taxed portion of the distribution was received as a payment. The payment was utilized for:

   □ Medical Expenses  _____ %    □ Household Expenses  _____ %
   □ Debt Payments  _____ %    □ Personal Use  _____ %

___ 5.) Other:

   __________________________________________________________

If one of the above items is checked, please attach a written explanation and a copy of the applicable 2022 1099-R tax form.