

Form 1099-R

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CHARLES SCHWAB TRUST BANK PIPER SANDLER COMPANIES RETIREMENT 11800 SCHWAB WAY AUSTIN, TX 78758

1 Gross distribution \$ 68,563.55 2a Taxable amount \$ 0.00 2b Taxable amount not determined Total distribution

OMB No. 1545-0119

2022

Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

PAYER'S TIN 82-3967259 RECIPIENT'S TIN XXX-XX-5585 3 Capital gain (included in box 2a) \$ 4 Federal income tax withheld \$ 5 Employee contributions /Designated Roth contributions or insurance premiums \$ 6 Net unrealized appreciation in employer's securities \$ 7 Distribution code(s) G IRA/SEP/SIMPLE 8 Other \$ % 9a Your percentage of total distribution % 9b Total employee contributions \$ 14 State tax withheld \$ 15 State/Payer's state no. MN/5876814 16 State distribution \$ 17 Local tax withheld \$ 18 Name of locality \$ 19 Local distribution \$

Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return. This information is being furnished to the IRS.

www.irs.gov/Form1099R

Department of the Treasury - Internal Revenue Service

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Copy 2 File this copy with your state, city, or local income tax return, when required.

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Support Ph #: 800-724-7526