|  | age and Tax Statement 2023   | OMB No.   | . 1545-0008   |  |  | Dep   | partment of the Treasury -   | Internal Re  | evenue Service   |
|--|--|---|---|--|--|---|--|--|--|
| Control num<br>1071140802  |  |   |   | Employer ide<br>13-4994650   | entification number EIN  | Co  | opy B, To Be Filed With  | Employee   | 's FEDERAL Tax Return  |
| Employer's name, address and ZIP code<br>JPMorgan Chase Bank, National Association   |  |   |   | Employee's social security number 755-49-4694  |  |   | 1 Wages, tips, other compensation<br>174339.29   |  | 2 Federal income tax withheld 31317.06   |
| 1111 Polaris Parkway Columbus, OH 43240  Employee's first name and init Last name Suffix   |  |   |   | 7 Social security tips   |  | 3 Social security wages<br>160200.00  |  | 4 Social security tax withheld 9932.40   |  |
|  |  |   | Suffix  | 8 Allocated tips   |  | 5 Medicare wages and tips<br>182293.15  |  | 6 Medicare tax withheld<br>2643.25   |  |
| Nivas Kulukuri 4104 Hollandwood Dr   |  |   | Sullix  |  |  |   | 10 Dependent care benefits   |  | 11 Nonqualified plans  |
|  | Hollandwood Dr<br>ney, TX 75071  |   |   | 12a C  | 48.00  | 13  | 3 Statutory Employee   |  | 14 Other   |
|  |  |   |   | 12b D  | 7953.86  | 1 "   |  | ×  |  |
| Employe  | ee's address and ZIP code  |   |   | 12c DD<br>12d V  | 17478.30<br>94.74  |   | Third-party sick pay   |  |  |
| 15 State   | Employer's state ID number   | 16 State wages, tips etc.   | 17 State  | income tax   | 18 Local wages, tips   | etc.  | 19 Local income tax  | 20 Loca  | ality name   |
|  |  |   |   |  |  |   |  |  |  |
| This information   | is being furnished to the Internal Rever   | nue Service. If you are required t  | o file a tax ret  | urn, a negligence j  | penalty or other sanction may  | be imp  | posed on you if this income is   | taxable and  | you fail to report it.   |
| Form W-2 W   | age and Tax Statement 2023   | OMB No  | o. 1545-0008  |  | entification number EIN  | Co  |  |  | sury - Internal Revenue Service<br>RDS (See Notice to Employee on  |
|  | 107114080282   |   |   |  | 13-4994650   |   | back of Copy B)  |  |  |
| Employer's name, address and ZIP code JPMorgan Chase Bank, National Association  |  |   |   | Employee's social security number 755-49-4694  |  | 1 Wages, tips, other compensation 174339.29   |  | 2 Federal income tax withheld 31317.06   |  |
|  | Polaris Parkway<br>Bus, OH 43240   |   |   | 7 Social security tips   |  | 3 Social security wages<br>160200.00  |  | 4 Social security tax withheld 9932.40   |  |
|  | 1.0°   |   | G CC  | 8 Allocated  | tips   | 5   | Medicare wages and tips  |  | 6 Medicare tax withheld  |
| Employe<br>Nivas   | ee's first name and init Last name<br>Kulukur:   | Ĺ   | Suffix  |  |  | 182293.15  10 Dependent care benefits   |  |  | 2643.25<br>11 Nonqualified plans   |
|  | Hollandwood Dr<br>ney, TX 75071  |   |   | 12- C  | 140.00   |   | •  |  |  |
| 110111111  | 107, 111 75071   |   |   | 12a C<br>12b D   | 48.00<br>7953.86   | 13  |  | ∐<br><b>⊠</b>  | 14 Other   |
|  | 1.77   |   |   | 12c DD   | 17478.30   |   |  |  |  |
| 15 State   | ee's address and ZIP code Employer's state ID number   | 16 State wages, tips etc.   | 17 State  | 12d V<br>income tax  | 94.74<br>18 Local wages, tips  | 1   | 19 Local income tax  | _  | lity name  |
|  |  | and mages, aparen   |   |  | as a see   |   |  |  |  |
| Form W-2 Wage and Tax Statement 2023 OMB No. 1545-000 Control number 107114080282  |  |   |   |  |  |   |  |  |  |
| Control num  | nber   | OMB No.   | . 1545-0008   |  | entification number EIN  |   | opy 1, To Be Filed With  |  | sury - Internal Revenue Service<br>'s State, City, or Local Income   |
| Control num<br>1071140802<br>Employe   | aber<br>182<br>er's name, address and ZIP code   |   | . 1545-0008   | Employer ide<br>13-4994650<br>Employee's s   | ocial security number  | Ta  | opy 1, To Be Filed With I<br>ax Return<br>Wages, tips, other compen  | Employee'  | 's State, City, or Local Income  2 Federal income tax withheld   |
| Control num<br>1071140802<br>Employe<br>JPMorg<br>1111 F   | aber<br>282<br>er's name, address and ZIP code<br>gan Chase Bank, National<br>Polaris Parkway  |   | . 1545-0008   | Employer ide<br>13-4994650   | ocial security number  | 1<br>17-<br>3   | opy 1, To Be Filed With hax Return Wages, tips, other compered 4339.29 Social security wages   | Employee'  | 2 Federal income tax withheld 31317.06 4 Social security tax withheld  |
| Control num<br>1071140802<br>Employe<br>JPMorg<br>1111 F   | aber<br>1882<br>er's name, address and ZIP code<br>gan Chase Bank, National  |   | . 1545-0008   | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect   | ocial security number  | 1<br>17<br>3<br>16  | opy 1, To Be Filed With hax Return Wages, tips, other compered 4339.29 Social security wages 60200.00  | Employee'  | 2 Federal income tax withheld 31317.06   |
| Control num<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb   | nber<br>182<br>pr's name, address and ZIP code<br>gan Chase Bank, National<br>Polaris Parkway<br>pus, OH 43240<br>be's first name and init Last name   | Association   | . 1545-0008<br>Suffix   | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694  | ocial security number  | 1<br>17<br>3<br>16<br>5<br>18   | ppy 1, To Be Filed With ax Return Wages, tips, other comper (4339.29 Social security wages (50200.00 Medicare wages and tips (52293.15   | Employee'  | 2 Federal income tax withheld<br>31317.06<br>4 Social security tax withheld<br>9932.40<br>6 Medicare tax withheld<br>2643.25   |
| Control nun<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 E   | nber<br>1882<br>er's name, address and ZIP code<br>pan Chase Bank, National<br>Polaris Parkway<br>pus, OH 43240<br>ee's first name and init Last name<br>Kulukur:  | Association   |   | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect   | ocial security number  | 1<br>17<br>3<br>16<br>5<br>18   | ppy 1, To Be Filed With lax Return Wages, tips, other compet (4339.29 Social security wages (50200.00 Medicare wages and tips  | Employee'  | 2 Federal income tax withheld<br>31317.06<br>4 Social security tax withheld<br>9932.40<br>6 Medicare tax withheld  |
| Control nun<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 E   | nber<br>1822<br>pr's name, address and ZIP code<br>gan Chase Bank, National<br>rolaris Parkway<br>pus, OH 43240<br>be's first name and init Last name<br>Kulukur:  | Association   |   | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated  | ocial security number urity tips   | Ta 1 17 3 16 5 18   | ppy 1, To Be Filed With ax Return Wages, tips, other comper (4339,29 Social security wages (50200,00) Medicare wages and tips (52293.15) Dependent care benefits Statutory Employee  | Employee'  | 2 Federal income tax withheld<br>31317.06<br>4 Social security tax withheld<br>9932.40<br>6 Medicare tax withheld<br>2643.25   |
| Control nun<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 E   | nber<br>1882<br>er's name, address and ZIP code<br>pan Chase Bank, National<br>Polaris Parkway<br>pus, OH 43240<br>ee's first name and init Last name<br>Kulukur:  | Association   |   | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect   | ocial security number urity tips   | Ta  1 17 3 16 5 18 10   | ppy 1, To Be Filed With ax Return Wages, tips, other comper (4339.29 Social security wages (0200.00) Medicare wages and tips (2293.15) Dependent care benefits Statutory Employee Retirement Plan  | Employee' nsation  | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  |
| Control num<br>1071140802<br>Employe<br>JPMOrg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 F<br>McKinn   | nber 1822 r's name, address and ZIP code 1822 r's name, address and ZIP code 1821 rolaris Parkway 1822 rolaris Par | Association   | Suffix  | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V   | ocial security number urity tips tips  48.00 7953.86 17478.30 94.74  | Ta 1 17. 3 16 5 18 10   | ppy 1, To Be Filed With ax Return Wages, tips, other comper 4339.29 Social security wages 50200.00 Medicare wages and tips 52293.15 Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay  | Employee' nsation  | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans 14 Other   |
| Control num<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 F<br>McKinn   | nber<br>182<br>pr's name, address and ZIP code<br>pan Chase Bank, National<br>Polaris Parkway<br>pus, OH 43240<br>pe's first name and init Last name<br>Kulukur:<br>Hollandwood Dr<br>ney, TX 75071  | Association   | Suffix  | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated  | decial security number curity tips tips 48.00 7953.86 17478.30   | Ta 1 17. 3 16 5 18 10   | ppy 1, To Be Filed With ax Return Wages, tips, other comper (4339.29 Social security wages (0200.00) Medicare wages and tips (2293.15) Dependent care benefits Statutory Employee Retirement Plan  | Employee' nsation  | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  |
| Control num<br>1071140802<br>Employe<br>JPMorg<br>1111 F<br>Columb<br>Employe<br>Nivas<br>4104 F<br>McKinn<br>Employe<br>15 State  | ris name, address and ZIP code yean Chase Bank, National yolaris Parkway bus, OH 43240  ee's first name and init Last name Kulukur: dollandwood Dr hey, TX 75071  ee's address and ZIP code  Employer's state ID number  | Association  16 State wages, tips etc.  | Suffix  17 State  | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V<br>income tax   | 48.00 48.00 7953.86 17478.30 94.74 18 Local wages, tips  | Ta 1 17 3 16 5 18 10 13   | ppy 1, To Be Filed With ax Return Wages, tips, other compet (4339.29 Social security wages (50200.00 Medicare wages and tips (52293.15 Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay  19 Local income tax  | insation ins | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans 14 Other   |
| Control num 1071140802 Employe JPMorg 1111 F Columb  Employe Nivas 4104 F McKinn  Employe 15 State   | ris name, address and ZIP code yean Chase Bank, National yolaris Parkway bus, OH 43240  ee's first name and init Last name Kulukur: dollandwood Dr heey, TX 75071  ee's address and ZIP code  Employer's state ID number  is being furnished to the Internal Rever   | Association  16 State wages, tips etc.  1e Service. If you are required to          | Suffix  17 State  10 ofile a tax ret                                | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V<br>income tax   | 48.00 48.00 7953.86 17478.30 94.74 18 Local wages, tips  | Ta 1 17 3 16 5 18 10 13   | py 1, To Be Filed With ax Return Wages, tips, other compet (4339.29) Social security wages (50200.00) Medicare wages and tips (52293.15) Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay  19 Local income tax  posed on you if this income is  | employee' assation  20 Loca ataxable and   | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  14 Other  lity name   |
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| Control num 1071140802 Employe JPMorg 1111 F Columb  Employe Nivas 4104 F McKinn  Employe 15 State  Form W-2 W Control num 1071140802 Employe  | ris name, address and ZIP code yan Chase Bank, National yolaris Parkway bus, OH 43240  ee's first name and init Last name Kulukur: dollandwood Dr eey, TX 75071  ee's address and ZIP code  Employer's state ID number  is being furnished to the Internal Rever   | Association  16 State wages, tips etc.  use Service. If you are required to OMB No. | Suffix  17 State  10 ofile a tax ret                                | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V<br>income tax<br>urn, a negligence J<br>Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694                                 | arity tips tips  48.00 7953.86 17478.30 94.74 18 Local wages, tips  enalty or other sanction may entification number EIN ocial security number                       | Ta 1 177 3 166 5 188 100 13 143 15 Eetc.  Co Ta 1   | ppy 1, To Be Filed With ax Return Wages, tips, other compet (4339,29) Social security wages (50200,00) Medicare wages and tips (52293.15) Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay  19 Local income tax  Department of the proper of  | insation  20 Loca  20 Loca  taxable and ta | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  14 Other  dity name  you fail to report it.  ury - Internal Revenue Service   |
| Control num 1071140802 Employe JPMorg 1111 F Columb  Employe Nivas 4104 F McKinn  Employe 15 State  This information  Form W-2 W  Control num 1071140802 Employe JPMorg 111 F            | ris name, address and ZIP code gan Chase Bank, National colaris Parkway bus, OH 43240  re's first name and init Last name Kulukur: dollandwood Dr tey, TX 75071  re's address and ZIP code  Employer's state ID number  Lis being furnished to the Internal Rever  | Association  16 State wages, tips etc.  use Service. If you are required to OMB No. | Suffix  17 State  10 ofile a tax ret                                | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V<br>income tax   | arity tips tips  48.00 7953.86 17478.30 94.74 18 Local wages, tips  enalty or other sanction may entification number EIN ocial security number                       | Ta 1 17. 3 166 5 18 100 100 100 100 100 100 100 100 100   | py 1, To Be Filed With ax Return  Wages, tips, other compet (4339.29) Social security wages (50200.00) Medicare wages and tips (52293.15) Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay  19 Local income tax  Department of this income is  Department of the proper o | insation  20 Loca  20 Loca  taxable and ta | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  14 Other  dity name  you fail to report it.  ury - Internal Revenue Service 's State, City, or Local Income  2 Federal income tax withheld  |
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| Control num 1071140802 Employe JPMorg 1111 F Columb  Employe Nivas 4104 E McKinn  Employe 15 State  Form W-2 W  Control num 1071140802 Employe JPMorg 111 F Columb  Employe Nivas 4104 E | ris name, address and ZIP code gan Chase Bank, National colaris Parkway bus, OH 43240  re's first name and init Last name Kulukur: Hollandwood Draey, TX 75071  re's address and ZIP code  Employer's state ID number  ris being furnished to the Internal Reversity Being furnished to th | Association  16 State wages, tips etc.  OMB No.  Association                        | Suffix  17 State  1 o file a tax ret  1545-0008                     | Employer ide 13-4994650 Employee's s 755-49-4694 7 Social secu- 8 Allocated  12a C 12b D 12c DD 12d V income tax  urn, a negligence j Employer ide 13-4994650 Employee's s 755-49-4694 7 Social secu- 8 Allocated  | arity tips tips  48.00 7953.86 17478.30 94.74 18 Local wages, tips  enalty or other sanction may entification number EIN ocial security number arity tips tips  8.00 | Ta 1 17. 3 166 5 188 10 13 etc.  Co Ta 1 17. 3 166 5 188 10 10 11 11 17 11 17 11 11 11 11 11 11 11 11   | py 1, To Be Filed With ax Return Wages, tips, other competed 4339.29 Social security wages 60200.00 Medicare wages and tips 12293.15 Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay 19 Local income tax 19 Local income tax 19 Local income is Department of the proper state of  | insation  20 Loca  21 Laxable and 3  4 the Treast  Employee'   | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans 14 Other  dity name  you fail to report it.  2 Federal income tax withheld 31317.06 4 Social security tax withheld 31317.06 6 Medicare tax withheld 31317.06 6 Medicare tax withheld 2643.25 |
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| Control num 1071140802 Employe JPMorg 1111 F Columb  Employe Nivas 4104 F McKinn  Form W-2 W Control num 1071140802 Employe JPMorg 111 F Columb  Employe Nivas 4104 F McKinn             | ris name, address and ZIP code yan Chase Bank, National volaris Parkway bus, OH 43240  ee's first name and init Last name Kulukur: All Sandress and ZIP code Employer's state ID number with the state of the Internal Reversible of the Inte | Association  16 State wages, tips etc.  OMB No.  Association                        | Suffix  17 State  16 State  17 State  17 State  17 State  18 Suffix | Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated<br>12a C<br>12b D<br>12c DD<br>12d V<br>income tax<br>urn, a negligence J<br>Employer ide<br>13-4994650<br>Employee's s<br>755-49-4694<br>7 Social sect<br>8 Allocated | arity tips tips  48.00 7953.86 17478.30 94.74 18 Local wages, tips  entification number EIN ocial security number arity tips tips  8.00 953.86                       | Ta 1 177 3 166 5 188 100 113 113 114 115 115 115 116 117 117 117 117 117 117 117 117 117  | py 1, To Be Filed With ax Return Wages, tips, other competed 4339.29 Social security wages 60200.00 Medicare wages and tips 12293.15 Dependent care benefits Statutory Employee Retirement Plan Third-party sick pay 19 Local income tax Department of 19 Local income is 19 Local inco | insation  20 Loca  20 Loca  taxable and ta | 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans  14 Other  14 Other  13 State, City, or Local Income 2 Federal income tax withheld 31317.06 4 Social security tax withheld 9932.40 6 Medicare tax withheld 2643.25 11 Nonqualified plans     |

This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

## **Notice to Employee**

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2023 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2023 or if income is earned for services provided while you were an inmate at a penal institution. For 2023 income limits and more information, visit www.irs.gov/EITC. See also Pub. 596. Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.

Employee's social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and the Social Security Administration (SSA).

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the SSA to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 1-800-772-1213. You also may visit the SSA at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in Box 12, using Code DD, of the cost of employer-sponsored health coverage is for your information only. The amount reported with Code DD is not taxable.

Credit for excess taxes. If you had more than one employer in 2023 and more than \$9,932.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. See the Form 1040 instructions. If you had more than one railroad employer and more than \$5,821.20 in Tier 2 RRTA tax was withheld, you also may be able to claim a refund on Form 843. See the instructions for Form 843.

## Instructions for Employee (See also Notice to Employee, on the back of Copy B.)

- Box 1. Enter this amount on the wages line of your tax return.
- Box 2. Enter this amount on the federal income tax withheld line of your tax return.
- Box 5. You may be required to report this amount on Form 8959. See the From 1040 instructions to determine if you are required to complete Form 8959.

Box 6. This amount includes the 1.45% Medicare Tax withheld on all Medicare wages and tips shown in Box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

Box 8. This amount is not included in boxes 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions.

You must file Form 4137 with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan or (b) included in box 3 and/or 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$22,500 (\$15,500 if you only have SIMPLE plans; \$25,500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$22,500. Deferrals under code H are limited to \$7,000.

However, if you were at least age 50 in 2023, your employer may have allowed an additional deferral of up to \$7,500 (\$3,500 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

Note. If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess

deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year. A - Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

- B Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.
- C Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5)
- D Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
- E Elective deferrals under a section 403(b) salary reduction agreement
- F Elective deferrals under a section 408(k)(6) salary reduction SEP
- G Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan
- H Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.
- J Nontaxable sick pay (information only, not included in boxes 1, 3, or 5)
- K 20% excise tax on excess golden parachute payments. See the Form 1040 instructions.
- L Substantiated employee business expense reimbursements (nontaxable)
- M Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- N Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.
- P Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in boxes 1, 3, or 5)
- Q Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.
- R Employer contributions to your Archer MSA. Report on Form 8853.
- S Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)
- T Adoption benefits (not included in box 1). Complete form 8839 to figure any taxable and nontaxable amounts.
- V Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to social security wage base), and 5). See Pub. 525 for reporting requirements.
- W Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889.
- Y Deferrals under a section 409A nonqualified deferred compensation plan
- Z Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in box 1. It is subject to an additional 20% tax plus interest. See the Form 1040 instructions.
- AA Designated Roth contributions under a section 401(k) plan
- BB Designated Roth contributions under a section 403(b) plan
- DD Cost of employer-sponsored health coverage. The amount reported with Code DD is not taxable.
- EE Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.
- FF Permitted benefits under a qualified small employer health reimbursement arrangement.
- GG Income from qualified equity grants under section 83(i).
- **HH** Aggregate deferrals under section 83(i) elections as of the close of the calendar year.
- Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A.
- Box 14. Employers may use this box to report information such as state disability insurance taxes withheld, union dues, uniform payments, health insurance premiums deducted, nontaxable income, educational assistance payments, or a member of the clergy's parsonage allowance and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Medicare tax and Additional Medicare Tax. Include tips reported by the employee to the employer in railroad retirement (RRTA) compensation.

Note. Keep Copy C of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help protect your social security benefits, keep Copy C 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.