



1099-R Form

For 2020, the IRS changed the box numbering system on the 1099-R by adding box numbers to two boxes that previously did not have numbers: "FACTA filing" and "Date of Payment" (see below for example). When filling out your taxes for the 2020 year, you can apply the new numbering system to the 1099-R form you received, by following the instructions and example below:

Form We Sent You	Updated Form: Use for Tax Filing Purposes
Amount in Box 12 "State tax withheld"	Apply to Box 14 "State tax withheld"
Number in Box 13 "State/Payer's state no."	Apply to Box 15 "State/Payer's state no."
Amount in Box 14 "State distribution"	Apply to Box 16 "State distribution"

New/Updated Version of 1099-R

12 FATCA filing requirement <input type="checkbox"/>	14 State tax withheld \$ _____ \$ _____	15 State/Payer's state no.	16 State distribution \$ _____ \$ _____
13 Date of payment	17 Local tax withheld \$ _____ \$ _____	18 Name of locality	19 Local distribution \$ _____ \$ _____

Your version of the 1099-R

FATCA filing requirement <input type="checkbox"/>	12 State tax withheld \$ _____ \$ _____	13 State/Payer's state no.	14 State distribution \$ _____ \$ _____
Date of payment	15 Local tax withheld \$ _____ \$ _____	16 Name of locality	17 Local distribution \$ _____ \$ _____