

## 2020 Form W-2 and Form 1099-R Incorrect or Not Received?

### From the Internal Revenue Website:

If your Form W-2, Wage and Tax Statement and/or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. aren't available to you by February 1, 2021, or if your information is incorrect on these forms, **contact your employer/payer**. If you still haven't received the missing or corrected form by the end of February, you may call the IRS at 800-829-1040 for assistance (see Telephone and Local Assistance for hours of operation). When you call, please have the following information available:

- Your name, address (including ZIP code), phone number, taxpayer identification number, and dates of employment,
- **Your employer/payer's name**, address (including ZIP code), and phone number,
- If known, your employer/payer's identification number.

The IRS will contact the employer/payer for you and request the missing or corrected form. The IRS will also send you a Form 4852, 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., along with a letter containing instructions for you.

If you don't receive the missing or corrected form in sufficient time to file your tax return, you may use Form 4852 to complete your return. Estimate your wages or the payments made to you and any taxes withheld and report them on Form 4852.

If you receive the missing or corrected Form W-2 or Form 1099-R after you file your return and the information differs from your estimates, you must file Form 1040-X, Amended U.S. Individual Income Tax Return. For additional information on filing an amended return, see Topic No. 308 and Should I File an Amended Return?

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