

1099-R Log

The IRS requires that Form 1099-R's be distributed, by January 31st of each year, to any employees who received distributions or rollovers of any kind during the past calendar year. This includes loans which have gone into default.

Please complete the attached 1099-R Log and return to us by **January 13th**, only if Siegel is to prepare the 1099-R's for the plan. If we do not receive the 1099-R log by this date we cannot guarantee that the Forms will be prepared timely.

We will prepare the Form 1096 along with the 1099 R's but we do **NOT** complete the Form 945. You may want to confer with your tax accountant in regard to the preparation of the Form 945.

If we do not receive the completed log by January 18th we will assume that you have made other arrangements toward the preparation of the 1099-R forms, unless otherwise instructed.

Siegel will **NOT** prepare any 1099-R Logs that are received, in our office, after January 17th.

Siegel Actuarial Consulting, Inc.
110 Arrowhead Drive, Suite 150
Slippery Rock, PA 15086
Telephone: 724-934-4780
www.sactpa.com

