PRO-P4 Sterling Scenario

Form **13614-C** (Rev. 10-2011) | Department of the Treasury – Internal Revenue Service
Intake/Interview & Quality Review Sheet | OMB # 1545-1964

Section A. You should complete Pages 1-3
Thank you for allowing us to prepare your tax return. **You are responsible for the information on your return so please provide complete and accurate information to the certified tax preparer.** If you have any questions please ask your preparer.

You will need your:
- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Proof of Identity (such as a valid drivers license or other government issued picture ID).

Part I. Your Personal Information

1. Your First Name: Steven | M. I.: A | Last Name: Sterling | Are you a U.S. Citizen? ☒ Yes ☐ No

2. Spouse's First Name: Page | M. I.: S | Last Name: Sterling | Is spouse a U.S. Citizen? ☒ Yes ☐ No

3. Mailing Address: 3717 Misty Meadow | Apt#: | City: Wharton | State: NJ | Zip Code: 07885

4. Contact Information
Phone: 973-555-1212 Cell Phone: E-mail:

5. Your Date of Birth: 09/21/1933 | 6. Your Job Title: Retired | Are you: 7. Legally Blind ☐ Yes ☒ No; 8. Totally and Permanently Disabled ☐ Yes ☒ No

9. Spouse's Date of Birth: 02/11/1951 | 10. Spouse's Job Title: Housewife | Is Spouse: 11. Legally Blind ☒ Yes ☐ No; 12. Totally and Permanently Disabled ☐ Yes ☒ No

13. Can anyone claim you or your spouse on their tax return? ☐ Yes ☒ No ☐ Unsure

Part II. Marital Status and Household Information

1. As of December 31, 2011, were you?
- ☐ Single
- ☒ Married: Did you live with your spouse during any part of the last six months of 2011? ☒ Yes ☐ No
- ☐ Divorced or Legally Separated: Date of final decree or separate maintenance agreement: ____________
- ☐ Widowed: Year of spouse's death: __________

2. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please check here ☐ and list on page 3.

Name (first, last) Do not enter your name or spouse's name below. (a)	Date of Birth (mm/dd/yy) (b)	Relationship to you (e.g. daughter, son, mother, sister, none) (c)	Number of months lived in your home in 2011 (d)	US Citizen or resident of the US, Canada or Mexico in 2011 (yes/no) (e)	Marital Status as of 12/31/11 (S/M) (f)	Full-time student in 2011 (yes/no) (g)	Received less than $3700 income in 2011 (yes/no) (h)
Samantha Summers	01-13-40	Sister	12	Yes	S	No	Yes

- **Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.**
- To report unethical behavior to IRS, **email us at wi.voltax@irs.gov** or call **toll free 1-877-330-1205.**

To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.

Part III. Income – In 2011, did you (or your spouse) receive:

Yes	No	Unsure	
☐	☒	☐	1. Wages or Salary? (Form W-2)
☐	☒	☐	2. Tip Income?
☐	☒	☐	3. Scholarships? (Forms W-2, 1098-T)
☒	☐	☐	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☒	☐	5. Refund of state/local income taxes? (Form 1099-G)
☐	☒	☐	6. Alimony Income?
☐	☒	☐	7. Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC)
☒	☐	☐	8. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)
☐	☒	☐	9. Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2)
☒	☐	☐	10. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)
☐	☒	☐	11. Unemployment Compensation? (Form 1099-G)
☒	☐	☐	12. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☒	☐	13. Income (or loss) from Rental Property?
☐	☒	☐	14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: ______ (Forms W-2 G, 1099-MISC)

Part IV. Expenses – In 2011 Did you (or your spouse) pay:

Yes	No	Unsure	
☐	☒	☐	1. Alimony: If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☒	☐	2. Contributions to a retirement account? ☐ IRA ☐ Roth IRA ☐ 401K ☐ Other
☐	☒	☐	3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T)
☐	☒	☐	4. Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)?
☒	☐	☐	5. Medical expenses (including health insurance premiums)?
☐	☒	☐	6. Home mortgage interest? (Form 1098)
☐	☒	☐	7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)
☐	☒	☐	8. Charitable contributions?
☐	☒	☐	9. Child/dependent care expenses, such as day-care?

Part V. Life Events – In 2011 Did you (or your spouse):

Yes	No	Unsure	
☐	☒	☐	1. Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12)
☐	☒	☐	2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C)
☐	☒	☐	3. Buy, sell or have a foreclosure of your home? (Form 1099-A)
☐	☒	☐	4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? ______
☐	☒	☐	5. Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?
☐	☒	☐	6. Live in an area that was affected by a natural disaster? If yes, where? ______
☐	☒	☐	7. Receive the First Time Homebuyers Credit in 2008?
☐	☒	☐	8. Pay any student loan interest? (Form 1098-E)
☐	☒	☐	9. Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much? ______
☐	☒	☐	10. Attend school as a full time student? (Form 1098-T)
☐	☒	☐	11. Adopt a child?
☐	☒	☐	12. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?

Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.)
Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☐ You ☐ Spouse

Catalog Number 52121E Form **13614-C** (Rev. 10-2011)
2

Additional Information and Questions related to the preparation of your return

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.

Other than English what language is spoken in the home? None

Are you or a member of your household considered disabled? ☒ **Yes** ☐ **No**

If you are due a refund or have a balance due:

- Ask your preparer about Direct Deposit. It is the fastest, easiest way to receive your tax refund. An e-filed return means a fast refund. Taxpayers who combine e-file and Direct Deposit can get their refunds in as few as 10 days.
- Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of $50 and earn interest for up to 30 years.

If you are due a refund, would you like a direct deposit?	☐ Yes	☒ No
If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?	☐ Yes	☒ No
If you are due a refund, would you like information on how to split your refund between accounts?	☐ Yes	☒ No
If you have a balance due, would you like to make a payment directly from your bank account?	☐ Yes	☒ No

Additional comments:

STOP HERE!
Thank you for completing this form.
Please give this form to the certified volunteer preparer for use in preparing your return.

Your Civil Rights are Protected: It is the Internal Revenue Service's mission to provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all. Under no circumstances will the Internal Revenue Service tolerate discrimination by its employees, grantees, contractors, and/or subcontractors. NO ONE shall be excluded from participating in, be denied the benefits of, or be subject to discrimination because of race, color, sex, national origin, disability, reprisal, or age in programs or activities funded by the Department of Treasury – Internal Revenue Service. Any person who believes that he/she has been discriminated against on the basis of race, color, sex, national origin, disability, reprisal or age in programs or activities receiving financial assistance (e.g. Low-Income Tax Clinics, Tax Counseling for the Elderly) from the Department of Treasury IRS, may submit a written complaint to: National Headquarters;Office of Equity, Diversity & Inclusion; Internal Revenue Service; Attn: Director, Civil Rights Division (External Civil Rights Team); 1111 Constitution Ave., NW Room 2422; Washington, DC 20224.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

PRO-P4 Sterling Scenario

Section B. For Certified Volunteer Preparer Completion

Remember: You are the link between the taxpayer's information and a correct tax return. Verify the taxpayer's information on pages 1, 2 & 3 is complete. All questions must be discussed with the taxpayer and all "Unsure" responses should be changed to "Yes" or "No".

Must be completed by Certified Volunteer only if persons are listed in Part II Question 2

Check if persons are listed in Part II Question 2 ☐

☐ Yes ☐ No 1. Can anyone else claim any of the persons listed in Part II, Question 2, as a dependent on their return? **If yes, which ones:**

____

____

____

☐ Yes ☐ No 2. Were any of the persons listed in Part II, Question 2, totally and permanently disabled? **If yes, which ones:**

____

____

____

☐ Yes ☐ No 3. Did any of the persons listed in Part II, Question 2 provide more than 50% of their own support? **If yes, which ones:**

____

____

____

☐ Yes ☐ No ☐ N/A 4. Did the taxpayer provide more than half the support for any of the persons in Part II, Question 2? **If yes, which ones:**

____

____

____

☐ Yes ☐ No 5. Did the taxpayer pay over half the cost of maintaining a home for any of the persons in Part II, Question 2? **If yes, which ones:**

____

____

____

Reminders

Use Publication 4012, *Volunteer Resource Guide* and Publication 17, *Your Federal Income Tax* in making tax law determinations.

Section C. For Certified Quality Reviewer Completion

Confirm each item after reviewing the tax return and verifying that it reflects correct tax law application to the information provided by the taxpayer.

1. **Sections A & B** of this form are complete.
2. **Taxpayer's identity, address** and **phone numbers** were verified.
3. **Names, SSNs, ITINs or EINs, and dates of birth** of **taxpayer, spouse** and **dependents** match the supporting documents.
4. **Filing Status** is correctly determined.
5. **Personal** and **Dependency Exemptions** are entered correctly on the return.
6. All **information** shown on source documents and noted in Section A, Part III is included on the tax return.
7. Any **Adjustments to Income** are correctly reported.
8. **Standard, Additional** or **Itemized Deductions** are correct.
9. All **credits** are correctly reported.
10. Withholding shown on Forms W-2, 1099 and **Estimated Tax Payments** are correctly reported.

☐ **All tax law issues above have been addressed and necessary changes have been made.**

☐ **If direct deposit or debit was elected, checking/saving account and routing information match the supporting documents.**

☐ **Correct SIDN and EFIN are shown on the return.**

Additional Tax Preparer Notes:

____

____

____

____

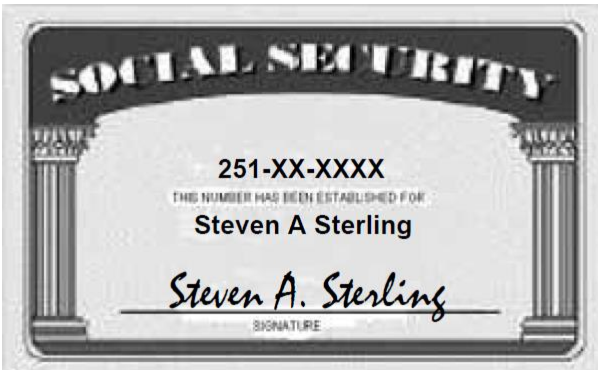
____

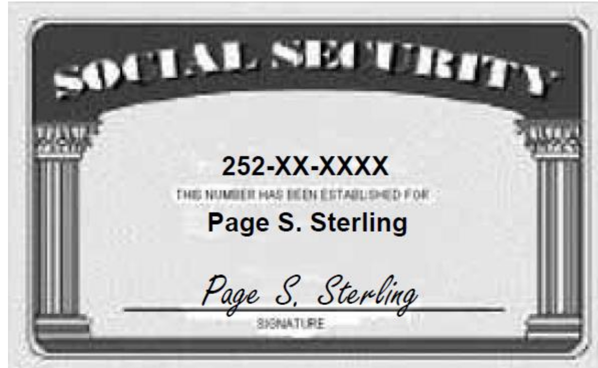
____

Catalog Number 52121E

Form **13614-C** (Rev. 10-2011)

PRO-P4 Sterling Scenario





PRO-P4 Sterling Scenario

Interview Notes - Sterling

1. Steven and Page have been married for over 40 years, and each year they return to your site to have their tax return completed. Steven retired from the International Brotherhood of Electrical Workers on January 1, 2008. Page, who is a housewife, is covered by the plan. He recovered a total of $681 of his cost in previous years.
2. Steven's sister, Samantha Summers, lived with them all year. She is an invalid and relies upon her brother for her support. She receives $250 per month in social security benefits.
3. Page has less than 20/200 vision in both eyes. She provided a doctor's statement.
4. Steven purchased 100 shares of Chapman stock in 1983 for $12,000. He sold the stock on March 23, 2011. He received $23,789 net of commissions on the sale. He did not receive a 1099-B for this transaction.
5. Steven and Page want their contribution to the Gubernatorial Election Campaign Fund to be handled the same as their contribution to the Presidential Election Campaign Fund.
6. They itemized deductions last year but did not receive any state refund.
7. Page was hit by a car in February of 2008 and was severely injured. Shortly after her release from the hospital she applied for Social Security Disability. Page received a lump sum payment from the Social Security in 2011.
8. The Sterlings brought in their prior year returns to find out if they need to do amended returns due to the lump sum that Page received.
9. Steven and Page have always filed joint returns and have never had any tax exempt interest. Steven's Social Security benefits have been $15,972 for each of the prior three years. Their combined AGI (taxable SS benefits) for 2008 was $36,391 ($4,126), for 2009 was $36,511 ($4,166), and for 2010 was $36,605 ($4,197).
10. They lived in Dover (zip code 07803) for the first half of the year (through June 30) and in Wharton (zip code 07885) for the second half of the year. They paid $1,000 per month in rent for the Dover apartment and $1,100 per month rent for the new Wharton apartment. They paid rent on both apartments in June and July.
11. Although they received a federal refund last year, they owed $203 to NJ (which they paid on time).
12. The Sterlings had no connection to any foreign financial activity.
13. Steven and Page discovered last year that they could buy things online and not pay NJ sales taxes so they did some Christmas shopping and purchased various other items online last year. When the NJ Use Tax rules were explained to them, they decided they better follow the NJ guidelines for reporting Use Tax on their NJ return because they had no easy way to calculate an exact total of purchases. None of the items cost more than $300.
14. They would like any NJ refund / amount due to be handled the same as on their federal return.

PRO-P4 Sterling Scenario

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no. Chapman Federal S & L Association 1413 5th Street Cincinnati, OH 45202	Payer's RTN (optional) 1 Interest income $ 124.73 2 Early withdrawal penalty $	OMB No. 1545-0112 2011 Form 1099-INT	Interest Income
PAYER'S federal identification number 24-5XXXXXX	RECIPIENT'S identification number 251-XX-XXXX	3 Interest on U.S. Savings Bonds and Treas. obligations $	**Copy B** **For Recipient** This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
RECIPIENT'S name Steven A. Sterling		4 Federal income tax withheld $	5 Investment expenses $
Street address (including apt. no.) 3717 Misty Meadow		6 Foreign tax paid $	7 Foreign country or U.S. possession
City, state, and ZIP code Wharton, NJ 07885		8 Tax-exempt interest $	9 Specified private activity bond interest $
Account number (see instructions)		10 Tax-exempt bond CUSIP no. (see instructions)	

Form **1099-INT** (keep for your records) Department of the Treasury - Internal Revenue Service

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no. New City Bank 1 Riverview Ft. Thomas, KY 41075	Payer's RTN (optional) 1 Interest income $ 1,864.78 2 Early withdrawal penalty $	OMB No. 1545-0112 2011 Form 1099-INT	Interest Income
PAYER'S federal identification number 24-6XXXXXX	RECIPIENT'S identification number 251-XX-XXXX	3 Interest on U.S. Savings Bonds and Treas. obligations $	**Copy B** **For Recipient** This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
RECIPIENT'S name Steven A. Sterling		4 Federal income tax withheld $	5 Investment expenses $
Street address (including apt. no.) 3717 Misty Meadow		6 Foreign tax paid $	7 Foreign country or U.S. possession
City, state, and ZIP code Wharton, NJ 07885		8 Tax-exempt interest $	9 Specified private activity bond interest $
Account number (see instructions)		10 Tax-exempt bond CUSIP no. (see instructions)	

Form **1099-INT** (keep for your records) Department of the Treasury - Internal Revenue Service

PRO-P4 Sterling Scenario

☐ CORRECTED (if checked)

Form 1099-DIV — 2011 — Dividends and Distributions (OMB No. 1545-0110)

PAYER'S name, street address, city, state, ZIP code, and telephone no.	Bridgeport Fund P.O. Box 5250 Hebron, KY 41048
PAYER'S federal identification number	24-7XXXXXX
RECIPIENT'S identification number	251-XX-XXXX
RECIPIENT'S name	Steven A. Sterling
Street address (including apt. no.)	3717 Misty Meadow
City, state, and ZIP code	Wharton, NJ 07885
Account number (see instructions)	
1a Total ordinary dividends	$ 162.99
1b Qualified dividends	$ 106.00
2a Total capital gain distr.	$ 68.75
2b Unrecap. Sec. 1250 gain	$
2c Section 1202 gain	$
2d Collectibles (28%) gain	$
3 Nondividend distributions	$
4 Federal income tax withheld	$
5 Investment expenses	$
6 Foreign tax paid	$ 13.15
7 Foreign country or U.S. possession	
8 Cash liquidation distributions	$
9 Noncash liquidation distributions	$

Copy B
For Recipient

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form **1099-DIV** (keep for your records) Department of the Treasury - Internal Revenue Service

☐ CORRECTED (if checked)

Form 1099-R — 2011 — Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. (OMB No. 1545-0119)

PAYER'S name, street address, city, state, and ZIP code	Averell Pension Fund 36964 Doane Road Louisville, KY 40202
PAYER'S federal identification number	24-8XXXXXX
RECIPIENT'S identification number	251-XX-XXXX
RECIPIENT'S name	Steven A Sterling
Street address (including apt. no.)	3717 Misty Meadow
City, state, and ZIP code	Wharton, NJ 07885
10 Amount allocable to IRR within 5 years	$
11 1st year of desig. Roth contrib.	
Account number (see instructions)	
1 Gross distribution	$ 18,625.00
2a Taxable amount	$
2b Taxable amount not determined	☒
Total distribution	☐
3 Capital gain (included in box 2a)	$
4 Federal income tax withheld	$ 1,715.00
5 Employee contributions /Designated Roth contributions or insurance premiums	$
6 Net unrealized appreciation in employer's securities	$
7 Distribution code(s)	7
IRA/ SEP/ SIMPLE	☐
8 Other	$ %
9a Your percentage of total distribution	%
9b Total employee contributions	$ 5,864.00
12 State tax withheld	$ $
13 State/Payer's state no.	
14 State distribution	$ $
15 Local tax withheld	$ $
16 Name of locality	
17 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 Internal Revenue Service.

Form **1099-R** Department of the Treasury - Internal Revenue Service

PRO-P4 Sterling Scenario

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code	Scripps Investment Partners 101 Main Street Cincinnati, OH 45202
1 Gross distribution	$ 11,793.00
2a Taxable amount	$ 11,793.00
OMB No. 1545-0119	2011 Form 1099-R
	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
2b Taxable amount not determined ☐	Total distribution ☐
PAYER'S federal identification number	24-9XXXXXX
RECIPIENT'S identification number	251-XX-XXXX
3 Capital gain (included in box 2a)	$
4 Federal income tax withheld	$ 1,179.00
RECIPIENT'S name	Steven A Sterling
5 Employee contributions /Designated Roth contributions or insurance premiums	$
6 Net unrealized appreciation in employer's securities	$
Street address (including apt. no.)	3717 Misty Meadow
7 Distribution code(s)	7
IRA/ SEP/ SIMPLE	☐
8 Other	$ %
City, state, and ZIP code	Wharton, NJ 07885
9a Your percentage of total distribution	%
9b Total employee contributions	$
10 Amount allocable to IRR within 5 years	$
11 1st year of desig. Roth contrib.	
12 State tax withheld	$ $
13 State/Payer's state no.	NJ/24-9XXXXXX
14 State distribution	$ $
Account number (see instructions)	
15 Local tax withheld	$ $
16 Name of locality	
17 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 Internal Revenue Service.

Form 1099-R — Department of the Treasury - Internal Revenue Service

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2011
- PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
- SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name	PAGE S. STERLING
Box 2. Beneficiary's Social Security Number	252-XX-XXXX
Box 3. Benefits Paid in 2011	$34,545.00
Box 4. Benefits Repaid to SSA in 2011	$0.00
Box 5. Net Benefits for 2011 *(Box 3 minus Box 4)*	$34,545.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit:
$32,350.20
Medicare Part B premiums deducted from your benefits: $1,384.80
Medicare Prescription Drug premiums (Part D) deducted from your benefits: $810.00

Total Additions:$34,545.00
Benefits for 2011:$8,820.00
Benefits for 2010:$8,820.00
Benefits for 2009:$8,820.00
Benefits for 2008:$8,085.00

DESCRIPTION OF AMOUNT IN BOX 4

Box 6. Voluntary Federal Income Tax Withholding

Box 7. Address

PAGE S. STERLING
3717 MISTY MEADOW
Wharton, NJ 07885

Box 8. Claim Number *(Use this number if you need to contact SSA.)*

Draft as of May 15, 2011 - Subject to Change

Form SSA-1099-SM (1-2011) **DO NOT RETURN THIS FORM TO SSA OR IRS**

PRO-P4 Sterling Scenario

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2011
- PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME.
- SEE THE REVERSE FOR MORE INFORMATION.

Box 1. Name	Box 2. Beneficiary's Social Security Number
STEVEN A. STERLING	251-XX-XXXX

Box 3. Benefits Paid in 2011	Box 4. Benefits Repaid to SSA in 2011	Box 5. Net Benefits for 2011 *(Box 3 minus Box 4)*
$15,972.00	$0.00	$15,972.00

DESCRIPTION OF AMOUNT IN BOX 3

Paid by check or direct deposit:

$13,227.20

Medicare Part B premiums deducted from your benefits: $1,384.80

Medicare Prescription Drug premiums (Part D) deducted from your benefits: $810.00

Total Additions:$15,972.00

Benefits for 2011:$15,972.00

DESCRIPTION OF AMOUNT IN BOX 4

Box 6. Voluntary Federal Income Tax Withholding

$550.00

Box 7. Address

STEVEN A STERLING

3717 MISTY MEADOW

Wharton, NJ 07885

Box 8. Claim Number *(Use this number if you need to contact SSA.)*

Draft as of May 15, 2011 - Subject to Change

Form SSA-1099-SM (1-2011) **DO NOT RETURN THIS FORM TO SSA OR IRS**