

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.
 ▶ Attach to Form 1040, 1040A, 1040-EZ or 1040X.

1 Type or print your first name and middle initial. Heather M	Last name Joslin	2 Social security number (SSN) <div style="background-color: gray; width: 100px; height: 15px;"></div>
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3 Address

4 Enter year in space provided and check one box. For the tax year ending December 31, 2005,
 I have been unable to obtain (or have received an incorrect) Form W-2 OR Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address and ZIP code <div style="background-color: gray; width: 100%; height: 20px;"></div>	6 Employer's or payer's identification number (if known) <div style="background-color: gray; width: 100px; height: 15px;"></div>
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7(A) Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	-0-	g State income tax withheld	36.04
b Social security wages	-0-	(Name of state) <u>MI</u>	
c Medicare wages and tips	-0-	h Local income tax withheld	-0-
d Advance EIC payment	-0-	(Name of locality)	
e Social security tips	-0-	i Social security tax withheld	101.37
f Federal income tax withheld	-0-	j Medicare tax withheld	23.71

7(B) Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc.

1 Gross distribution	-0-	4 Federal income tax withheld	-0-
2a Taxable amount	-0-	5 State income tax withheld	-0-
2b Taxable amount not determined <input type="checkbox"/>		6 Local income tax withheld	-0-
Total distribution <input type="checkbox"/>		7 Employee contributions	-0-
3 Capital gain (included in 2a)	-0-	8 Distribution codes	-

8 How did you determine the amounts in lines 7(A) and 7(B) above?
Company provided records and the statutory language behind IRC 3401 and 3121 and others.

9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
None. Most companies will refuse to issue forms correctly listing payments of "wages as defined in 3401(a) and 3121(a) for fear of IRS retaliation. The amounts listed as withheld on the W-2 they submitted are correct, however

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▶ Attach to Form 1040, 1040A, 1040-EZ or 1040X.

1 Type or print your first name and middle initial. **Last name**
Heather M **Joslin**

2 Social security number (SSN)
[REDACTED]

3 Address
[REDACTED]

4 Enter year in space provided and check one box. For the tax year ending December 31, 2005.
I have been unable to obtain (or have received an incorrect) Form W-2 OR Form 1099-R.

I have notified the IRS of this fact. The amounts shown on line 7 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.

5 Employer's or payer's name, address and ZIP code
[REDACTED]

6 Employer's or payer's identification number (if known)
[REDACTED]

7(A) Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	-0-	g State income tax withheld	89.74
b Social security wages	-0-	(Name of state)	MI
c Medicare wages and tips	-0-	h Local income tax withheld	-0-
d Advance EIC payment	-0-	(Name of locality)	
e Social security tips	-0-	i Social security tax withheld	215.13
f Federal income tax withheld	16.70	j Medicare tax withheld	50.32

7(B) Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc.

1 Gross distribution	-0-	4 Federal income tax withheld	-0-
2a Taxable amount	-0-	5 State income tax withheld	-0-
2b Taxable amount not determined <input type="checkbox"/>		6 Local income tax withheld	-0-
Total distribution <input type="checkbox"/>		7 Employee contributions	-0-
3 Capital gain (included in 2a)	-0-	8 Distribution codes	-

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9 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
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