



NEWS RELEASE

DEFENSE FINANCE AND ACCOUNTING SERVICE

1931 Jefferson Davis Highway, Crystal Mall 3
Arlington, Virginia 22240-5291

Press Release 02-3
November 7, 2001
For External Release

1099-R forms mailed by January 15, 2002

The 1099-R forms for tax year 2001 will be mailed to the home address on file with the Defense Finance and Accounting Service (DFAS) by January 15, 2002 to all Department of Defense military retirees and annuitants.

Former spouses who receive pay as a result of a court-ordered division of community property will also be receiving 1099-Rs.

The 1099-R form has three copies of the information on one page with the form information on the back of the recipient's copy. For example, box 1 (gross distribution) does not contain gross income, but is the total amount of annuity received – or, the taxable amount – as shown in box 2a. For retirees, this amount does not include nontaxable income such as Survivor Benefit Plan (SBP) costs.

Because the 1099-R is also used to report other types of income, the boxes that do not apply to retired members and annuitants will be left blank or have not been included in the form. For example, boxes 2b and 9 will be blank, and boxes 3,5,6 and 8 have been removed from these forms. The remaining boxes correspond to IRS instructions for 1040 and 1040A forms.

Retirees in a non-pay status, such as those receiving a full VA waiver or a full Civil Service waiver, will not receive a 1099-R.

REISSUE REQUESTS

Retirees that do not get their 1099-Rs by January 31, 2002, have questions about their 1099-R forms or need to update their mailing addresses may contact: Defense Finance and Accounting Service at 1-800-321-1080, Monday through Friday, between the hours of 7 a.m. and 7:30 p.m. Eastern Time.

Annuitants who do not receive their 1099-R by January 31, 2002 or have questions should contact DFAS at 1-800-435-3396 between 6:30 am and 4:00 PM Mountain Standard Time. Be prepared to provide your social security number and current mailing address.

When calling to request a reissue of your 2001 1099-R, press 1099 when prompted and your call will be forwarded to the next available Tax Customer Service Representative. Be prepared to provide your social security number, date of retirement, if you are a recent retiree and your current mailing address. DFAS Cleveland will begin processing reissues on January 31, 2002. You can expect to receive the reissued 1099-R approximately seven working days after your initial request.

Written or faxed requests should be sent to one of the following:

Retirees and former spouses

Defense Finance and Accounting Service – Cleveland
Code PRR
P.O. Box 99191
Cleveland, OH 44199-1126
Phone: 1-800-321-1080 FAX: 1-800-469-6559

Annuitants:

Defense Finance and Accounting Service – Denver
DFAS-DE/PRRB
6760 E. Irvington Place
Denver, CO 80279-6000
Phone: 1-800-435-3396 or 216-522-5955 FAX: 1-800-982-8459

CORRECTED 1099-Rs

To ensure the DFAS report of income and taxes matches the 1099-R you file with the IRS, requests for corrected 1099-Rs must be made in writing. The written request must include a complete explanation and justification as to why the 1099-R amounts are in error. Telephone, e-mail or internet requests for corrected 1099-Rs will **NOT** be honored. You can use the addresses and fax numbers above to send or fax information for corrections to your 1099-Rs.

If you don't receive your 1099-R, or if it is incorrect, please alert DFAS at least seven working days in advance of the April 15, 2002 filing deadline. This will allow DFAS the opportunity to mail your form in time for the tax-filing deadline.

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For more information, please contact Cathy Ferguson, 703-607-2716