

Are you a retiree, beneficiary or a former member who received payments from TRS in 2023, such as annuity payments, death benefits or a refund? If so, TRS will begin mailing 1099-R forms for tax year 2023 in mid-January 2024.

Explanations of all boxes on your 1099-R form are found on the back side of the form. Since TRS receives many questions about some of those boxes, we have explained several below.

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution \$ Total amount paid to you by TRS	OMB No. 1545-0119	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	
		2a Taxable amount \$ Taxable amount paid to you by TRS	2023 Form 1099-R		
		2b Taxable amount not determined <input type="checkbox"/>		Total distribution <input type="checkbox"/>	Copy C For Recipient's Records
PAYER'S TIN	RECIPIENT'S TIN	3 Capital gain (included in box 2a) \$	4 Federal income tax withheld \$ Total amount of income tax withheld		
RECIPIENT'S name		5 Employee contributions/ Designated Roth contributions or insurance premiums \$	6 Net unrealized appreciation in employer's securities \$	This information is being furnished to the IRS.	
		7 Distribution code(s) IRA/SEP/SIMPLE <input type="checkbox"/>	8 Other \$ %		
City or town, state or province, country, and ZIP or foreign postal code		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 FATCA filing requirement <input type="checkbox"/>	14 State tax withheld \$	15 State/Payer's state no.	16 State distribution \$
Account number (see instructions)		13 Date of payment	17 Local tax withheld \$	18 Name of locality	19 Local distribution \$
Form 1099-R (keep for your records)		www.irs.gov/Form1099R	Department of the Treasury - Internal Revenue Service		

Box 5 is the difference in Box 1 and 2a – this is the amount you received from TRS for which you have already paid taxes

Box 7 is the distribution code which identifies the type of benefit – see the reverse side of your 1099-R for a description of the code

\*\*\*For TRS purposes: Box 5 does not represent the insurance premium deducted from your TRS annuity, nor does the form from TRS have anything to do with Roth IRA contributions. If you need the insurance premium amount for your tax preparation, this information is available online at the TRS website if you are registered for MyTRS. You can find a copy of the 1095-B (Health Coverage) form in your Document Center. If you don't have access to the internet, please contact the appropriate health benefit office. For TRS-Care, call 1-888-237-6762. If you have coverage through the Employees Retirement System, University of Texas or Texas A&M, please contact them directly.

To change your tax withholding preference online, you must be registered for [MyTRS](#). Click the MyTRS login button on the TRS website's homepage ([www.trs.texas.gov](http://www.trs.texas.gov)), log in, and select Modify Withholding Preference. Otherwise, to change your withholding preference, please complete Form W-4P – [Withholding Certificate for Periodic Pension or Annuity Payments](#) and submit it to TRS. You may also call 1-800-223-8778 to request the form through our automated telephone system.

TRS cannot provide tax advice. Therefore, we recommend that you contact a tax preparer or an agent of the IRS for such advice.

**Internal Revenue Service (IRS)**  
**Phone: 1-800-829-1040**  
**IRS Web Site: [www.irs.gov](http://www.irs.gov)**

TRS will mail the 1099-R form to your address on file with TRS. If you have not received your copy by mid-February, there are several other ways to obtain a copy.

- View and print your 1099-R online from [MyTRS](#) on the TRS website ([www.trs.texas.gov](http://www.trs.texas.gov)). You must be registered for MyTRS to be able to access your form. Once you're signed in, you can access your 1099-R in the Document Center.
- **Retirees and beneficiaries, as well as members who have withdrawn/refunded their contributions, can log in to MyTRS to view and print their 1099-R.**
- Call TRS toll-free at 1-800-223-8778 and use the automated telephone system. Have your participant ID available. Follow the menu prompts to request a 1099-R form, which TRS will mail. We will only send the copy to the home address on file for you.
- Send a letter to TRS (1000 Red River St, Austin, TX 78701-2698). If you have moved, TRS must have your address change request *in writing*. Therefore, the best course of action is to request a duplicate 1099-R along with your written address change. Please include your participant ID and signature on the request.