



Federal IRS Income Tax Form for Tax Year 2009 (1/1/2009-12/31/2009)

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Qualified Disaster Recovery Assistance Retirement Plan Distributions and Repayments

▶ Attach to Form 1040, Form 1040A, or Form 1040NR.

Name. If married, file a separate form for each spouse required to file Form 8930. See instructions. Your social security number
:
:

**Fill in Your Address Only
If You are Filing This
Form by Itself and Not
With Your Tax Return**

| | |
|---|----------|
| Home address (number and street, or P.O. box if mail is not delivered to your home) | Apt. no. |
| City, town or post office, state, and ZIP code | |

Part I Total Distributions From All Retirement Plans (Including IRAs)

Complete this part only if you have qualified disaster recovery assistance distributions for 2009 and the total of your qualified disaster recovery assistance distributions for 2008, if any, was less than \$100,000 (see instructions).

Complete lines 1 through 5 of one column before going to the next column

| | (a) Total distributions for 2009 | (b) Qualified distributions (see instructions) | (c) Allocation of column (b) (see instructions) |
|---|--|--|---|
| 1 Enter in columns (b) and (c) the amount, if any, from your 2008 Form 8930, line 4, column (b). If this amount is \$100,000 or more, do not complete this part, you have no qualified disaster recovery assistance distributions for 2009 | | | |
| 2 Distributions from retirement plans | | | |
| 3 Distributions from traditional, SEP, and SIMPLE IRAs | | | |
| 4 Distributions from Roth IRAs | | | |
| 5 Totals. Add lines 1 through 4 in columns (a) and (b). Complete column (c) only if line 5, column (b), is more than \$100,000 | | | 100,000 00 |
| 6 Subtract line 1 (in columns (b) and (c)) from \$100,000 | | | |
| 7 If you completed column (c), enter the excess of the amount on line 5, column (a), over the amount on line 6, column (c). Otherwise, enter the excess of the amount on line 5, column (a), over the sum of the amounts on lines 2 through 4 in column (b). Report these distributions under the normal rules in accordance with the instructions for your tax return | | | 7 |

Part II Qualified Disaster Recovery Assistance Distributions From Retirement Plans (Other Than IRAs)

| | | | | |
|--|-----------|--|--|-----------|
| 8 Did you enter an amount on line 2, column (b)? <input type="checkbox"/> No. Skip lines 8 through 11, and go to line 12. <input type="checkbox"/> Yes. If you completed line 2, column (c), enter that amount. Otherwise, enter the amount from line 2, column (b) | | | | |
| 9 Enter the applicable cost of distributions, if any. See instructions | | | | 9 |
| 10 Subtract line 9 from line 8 | | | | 10 |
| 11 If you elect NOT to spread the taxable amount over 3 years, check this box <input type="checkbox"/> and enter the amount from line 10. You must check this box if you check the box on line 26. Otherwise, divide line 10 by 3.0 | | | | 11 |
| 12 Enter the amount, if any, from your 2008 Form 8930, line 9. If you checked the box on that line, enter -0- | | | | 12 |
| 13 Add lines 11 and 12 | | | | 13 |
| 14 Enter the amount, if any, from your 2008 Form 8930, line 10 | 14 | | | |
| 15 Enter the amount, if any, from your 2008 Form 8930, line 9 | 15 | | | |
| 16 Subtract line 15 from line 14. If zero or less, enter -0- | | | | 16 |
| 17 Enter the total amount of any repayments you made before filing your 2009 tax return. But do not include repayments made later than the due date (including extensions) for that return. See instructions | | | | 17 |
| 18 Add lines 16 and 17 | | | | 18 |
| 19 Amount subject to tax in 2009. Subtract line 18 from line 13. If zero or less, enter -0-. Include this amount in the total on Form 1040, line 16b; Form 1040A, line 12b; or Form 1040NR, line 17b | | | | 19 |

Before you begin: Complete Form 8606, Nondeductible IRAs, if required.

Part III Qualified Disaster Recovery Assistance Distributions From Traditional, SEP, SIMPLE, and Roth IRAs

| | | | |
|--|-----------|--|--|
| <p>20 Did you enter an amount on line 3, column (b), or line 4, column (b)? <input type="checkbox"/> Yes. Go to line 21. <input type="checkbox"/> No. Skip lines 21 through 26, and go to line 27.</p> | | | |
| <p>21 Did you receive a qualified disaster recovery assistance distribution from a traditional, SEP, SIMPLE, or Roth IRA that is required to be reported on Form 8606? <input type="checkbox"/> Yes. Go to line 22. <input type="checkbox"/> No. Skip lines 22 through 23, and go to line 24.</p> | | | |
| <p>22 Enter the amount, if any, from Form 8606, line 15b</p> | 22 | | |
| <p>23 Enter the amount, if any, from Form 8606, line 25b</p> | 23 | | |
| <p>24 If you completed line 3, column (c), enter that amount. Otherwise, enter the amount from line 3, column (b). Do not include any amounts reported on Form 8606</p> | 24 | | |
| <p>25 Add lines 22, 23, and 24</p> | 25 | | |
| <p>26 If you elect NOT to spread the taxable amount over 3 years, check this box <input type="checkbox"/> and enter the amount from line 25. You must check this box if you checked the box on line 11. Otherwise, divide line 25 by 3.0</p> | 26 | | |
| <p>27 Enter the amount, if any, from your 2008 Form 8930, line 17. If you checked the box on that line, enter -0-</p> | 27 | | |
| <p>28 Add lines 26 and 27</p> | 28 | | |
| <p>29 Enter the amount, if any, from your 2008 Form 8930, line 18</p> | 29 | | |
| <p>30 Enter the amount, if any, from your 2008 Form 8930, line 17</p> | 30 | | |
| <p>31 Subtract line 30 from line 29. If zero or less, enter -0-</p> | 31 | | |
| <p>32 Enter the total amount of any repayments you made before filing your 2009 tax return. But do not include repayments made later than the due date (including extensions) for that return. See instructions</p> | 32 | | |
| <p>33 Add lines 31 and 32</p> | 33 | | |
| <p>34 Amount subject to tax in 2009. Subtract line 33 from line 28. If zero or less, enter -0-. Include this amount in the total on Form 1040, line 15b; Form 1040A, line 11b; or Form 1040NR, line 16b</p> | 34 | | |

Sign Here Only If You Are Filing This Form by Itself and Not With Your Tax Return

Under penalties of perjury, I declare that I have examined this form, including accompanying attachments, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature Date

| | | | | |
|---------------------------------|---|--|--|---|
| Paid Preparer's Use Only | Preparer's signature | Date | Check if self-employed <input type="checkbox"/> | Preparer's SSN or PTIN |
| | Firm's name (or yours if self-employed), address, and ZIP code | EIN ; | Phone no. () | |