

Delaware Special Tax Computation for Lump Sum Distribution from Qualified Retirement Plan

Lump Sum Distributions

This form applies, in the case of someone who is not self-employed, only when the distribution was made:

- Due to the participant's death;
-Due to the participant's separation from employment; or
-After the participant had attained age 59 1/2

In the case of a self-employed person, this form applies only when the distribution was made:

- Due to the participant's death;
-After the participant had attained age 59 1/2
-The participant was previously disabled.

THIS FORM DOES NOT APPLY WHEN YOUR DISTRIBUTION WAS:

- Rolled over;
-An early distribution including an early distribution received for medical, education or housing exclusions; or
-Subject to the early withdrawal penalty on Line 58 of your Federal Form 1040.

Form fields for LAST NAME(S) AS SHOWN ON RETURN, YOUR FIRST NAME, and YOUR SOCIAL SECURITY NUMBER.

Form fields for SPOUSE'S LAST NAME (IF APPLICABLE), SPOUSE'S FIRST NAME (IF APPLICABLE), and SPOUSE'S SOCIAL SECURITY NUMBER (IF APPLICABLE).

Table with 16 rows for tax calculations, including descriptions like 'Enter capital gain portion of distribution from Box 3 of Form 1099R' and corresponding numerical input fields.

ATTACH FORM 329 AND FORM 4972 TO FORM 200 OR FORM 400



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