

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:

- Rollover;
-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.

LAST NAME(S) AS SHOWN ON RETURN

YOUR FIRST NAME

YOUR SOCIAL SECURITY NUMBER

Empty text box for last name

Empty text box for first name

Empty grid for social security number

SPOUSE'S LAST NAME (IF APPLICABLE)

SPOUSE'S FIRST NAME (IF APPLICABLE)

SPOUSE'S SOCIAL SECURITY NUMBER (IF APPLICABLE)

Empty text box for spouse's last name

Empty text box for spouse's first name

Empty grid for spouse's social security number

Table with 16 rows and 2 columns. Left column contains instructions for calculating tax on lump sum distribution. Right column contains empty boxes for entering the results of each step.

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



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