



Enclose with Form 740, Form 740-NP or Form 741.

See federal instructions.

Enter name of recipient of distribution. Social Security or Federal Identification Number

PART I - Qualifications - An individual who qualifies to file federal Form 4972 qualifies to file Form 4972-K.

1 Are you filing federal Form 4972? ... Yes No
If "Yes," you are qualified to file Form 4972-K. If "No," do not complete the rest of this form.

PART II - Excludable Lump-Sum Income - Complete this part after you have completed Schedule P.

Table with 3 columns: Description, Line Number, Amount. Includes rows for Schedule P line 3, capital gain distributions, and regular lump-sum distributions.

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PART III - Complete this part only if you chose the 20% federal capital gain election.

Table with 3 columns: Description, Line Number, Amount. Includes rows for capital gain part from Box 3, exclusion from line 6, and subtraction of line 8(b) from line 8(a).

PART IV - Complete this part to choose the 10-year option.

Table with 3 columns: Description, Line Number, Amount. Includes rows for ordinary income, death benefit exclusion, actuarial value of annuity, and tax on lump-sum distribution.