



American Portfolios Financial Services, Inc.
 4250 Veterans Memorial Hwy, Suite 420E
 Holbrook, NY 11741
 Phone: 800.889.3914
 www.americanportfolios.com

2023 Retirement Account Tax Information Statement

Recipient's Name and Address:

0004071 01 AB 0.534 01 XP99RE01 TR 00017

IRA FBO THOMAS R POOLE
 PERSHING LLC AS CUSTODIAN
 ROLLOVER ACCOUNT
 22 WISCONSIN AVE
 RENSSELAER NY 12144-4827



Your Investment Professional:

MANGOLD/RUGER
 AMERICAN PORTFOLIOS
 159 WOLF ROAD
 SUITE 101
 ALBANY NY 12205
 ID: ACX

Payer's Information:

PERSHING LLC
 ONE PERSHING PLAZA
 JERSEY CITY NJ 07399

Customer Service Phone Number: 518-477-6686

Payer's Federal Identification Number: 13-3718556

Recipient's Information:

Account Number: JLO-957819

Recipient's Identification Number: XXX-XX-8519

2023 Form 1099-R

Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

OMB No. 1545-0119

Copy C: For Recipient's Records

Box			Box		
1	Gross Distribution.....	\$22,647.06	9a	Your Percentage of Total Distribution.....	%
2a	Taxable Amount.....	\$22,647.06	9b	Total Employee Contributions.....	\$0.00
2b	Taxable Amount Not Determined.....	<input checked="" type="checkbox"/>	10	Amount allocable to IRR within 5 years.....	
	Total Distribution.....	<input type="checkbox"/>	11	1st Year of Designated Roth Contribution.....	
3	Capital Gain (included in Box 2a).....	\$0.00	12	FATCA Filing Requirement.....	<input type="checkbox"/>
4	Federal Income Tax Withheld.....	\$3,397.06	13	Date of Payment.....	
5	Employee Contributions/Designated Roth Contributions or Insurance Premiums.....	\$0.00	14	State Tax Withheld.....	\$0.00
6	Net Unrealized Appreciation in Employer's Securities.....	\$0.00	15	State/Payer's State Number.....	NY/13-3718556
7	Distribution Code(s).....	7	16	State Distribution.....	
	IRA/SEP/SIMPLE.....	<input checked="" type="checkbox"/>	17	Local Tax Withheld.....	\$0.00
8	Other Amount.....	\$0.00	18	Name of Locality.....	
	Other Percentage.....	0.00%	19	Local Distribution.....	\$0.00

This information is being furnished to the Internal Revenue Service.

The above represents a summary of your retirement account distribution activity for Tax Year 2023. The Internal Revenue Service instructions are on the back of this page.

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2023 Form 1099-R		Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.		OMB No.1545-0119	
Copy B: Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.					
Box				Box	
1	Gross Distribution.....		\$22,647.06	9a	Your Percentage of Total Distribution %
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7	Distribution Code(s).....		7	16	State Distribution.....
	IRA/SEP/SIMPLE.....		<input checked="" type="checkbox"/>	17	Local Tax Withheld..... \$0.00
8	Other Amount.....		\$0.00	18	Name of Locality.....
	Other Percentage.....		0.00%	19	Local Distribution..... \$0.00

This information is being furnished to the Internal Revenue Service.

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