

9



Individual Retirement	Account (IRA): Inclu	de all copies o	of Forms 1	099-R and 549	98.			
TS		<u> </u>						
IRA Questions for 2018:							Yes	No
	n employer's retirement plan?						100	
, ,	se covered by an employer's re							
	our IRA contribution to the ma							
	to contribute the maximum alle			•				
for an IRA dedu	uction?							
Did you use any IRA a	s security for a loan this year?							
Did you have any tran	sactions with any IRA during t	he year?						
If Yes, explain								
IRA Values, Rollovers, a	nd Distributions:							
Total value of all tradit	ional IRAs on December 31, 2	N18						
	tion or Form 5498 is required if							
Total distributions cor								
Contributions:								
IRA:								
Contributions in 20	018 for the 2018 tax return							
Contributions in 20								
Amount for 2018 y	ou choose to be treated as no	ondeductible						
Roth IRA:								
Contributions mad	e for the 2018 tax year							
Distributions:	Include all Forms	s 1099-R and a	any nontax	able distribut	ion details			
Nam	ne of Payer	2018 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	2017 G Distribu	





Pensions and Annuities:	Include all Forms 1099-R and an	y nontaxable distribution details

TSJ	Name of Payer	2018 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	2017 Gross Distributions

Self-Employed Retirement Plan:	Include copies of all Forms	1099-R	
		Taxpayer	Spouse
Have you established a self-employed ret deductible contributions?	rement or SIMPLE plan with	Yes No	Yes No
Do you want to contribute the maximum a	amount allowed?		
Contributions to:		2018 Amou	ınt 2018 Amount
Simplified employee pension plan			
Defined benefit plan			
Defined contribution plan			
SIMPLE plan			