

# PENSIONS, IRAS, LUMP-SUM DISTRIBUTIONS, GAMBLING

Please enclose copies of ALL **2024** 1099R and W2G forms

Taxpayer Spouse	Name of payer	2023 Total	2024 Total	Taxable amount	Federal withheld	State	State taxable	State withheld	I - IRA D - Disabled P - Pension O - Other

## ESTIMATED TAX PAYMENTS

Taxpayer Spouse Joint	2023 REFUND APPLIED TO 2024	1ST PAYMENT		2ND PAYMENT		3RD PAYMENT		4TH PAYMENT	
		Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
	Federal								
	State								
	Other								

## TAXPAYER

## SPOUSE

## OTHER INCOME

	2023	2024	2023	2024
State Refund				
Unemployment received				
Federal withheld				
State withheld				
Railroad unemployment received				
Railroad retirement tier 1 received				
Social security received on SSA-1099 box 5				
Medicare premiums withheld				
Alimony received				
Other income				

## ADJUSTMENTS TO INCOME

IRA contribution				
Self-employed health insurance				
Keogh/SEP contribution				
Early withdrawal penalty (interest forfeiture)				
Alimony paid				
Student loan interest				
Moving expense				
Other adjustments to income				